synergist®

Version 12.3 - Release Notes

Synergist Browser Interface

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Contents

Synergist v12.3 release

Overview

Synergist v12.3 includes enhancements to existing features as well as new areas of functionality. There are also interface behavior changes designed to improve usability, based on user feedback.

Key developments in this release:

- Kanban boards
- Activity checklist
- Synergist documents & templates feature
- Creating tabs on jobs & client based on a view
- Discount feature for Media buying

Synergist v12.3 requires 4D Server v17

Please note: These release notes relate to the Synergist browser interface only.

Accounts links

Count of unbatched postings for each type of entry

Previously, to find out if there are any unbatched postings for purchases (or nominal) you had to click on the radio buttons to see if there are any present.
Now, an unbatched count for each of Sales, Purchase and Nominal selectors is shown.

Revenue Recognition – Deferred or Accrued income

A new field has been added to specify Accrued or Deferred income for all sales transaction types when revenue recognition is enabled in company settings. The default for new transactions is set (if invoicing from a job or phase), based on any previous documents for the job/phase or based on any existing deferred/accrued balance for the job or phase. The default can be overridden manually for each transaction, if required.

Reports previously showed a single deferred amount which was either positive or negative. This is now separated into 2 columns, deferred value and accrued value, on relevant exports, based on the new setting from individual transactions.

Revenue Recognition – Nominal postings

Previously, when a sales invoice was created the nominal analysis was designed to post the full invoice value to the accounts P&L. This meant that a reversing manual journal was required at each month-end to make an entry for the outstanding deferred revenue balance.

A new company switch is now available to change this behaviour. When enabled, the system will post only the recognised amounts from sales transactions to the account's P&L whilst also posting a balancing entry for the deferred or accrued amount to a balance sheet account - deferred revenue or accrued revenue, based on the deferred / accrued setting for the transaction in question. The nominal codes for these two balance sheet accounts are specified in company settings.

In addition, revenue transactions will now create nominal analysis records that will be posted to the relevant P&L accounts and again a balancing entry posted to the deferred revenue or accrued revenue balance sheet nominal account as required.

The new company switch is only available when Sales Header Analysis (tied or not) is enabled, revenue recognition is enabled and you are using one of Synergist's accounting system links that support the posting of nominal journals. Previously this was only Exchequer.

Accounts links now supported for Nominal journal posting

- Exchequer
- Xero
- Sage 50 Direct Interface 2016/v22 or higher
- Aqilla

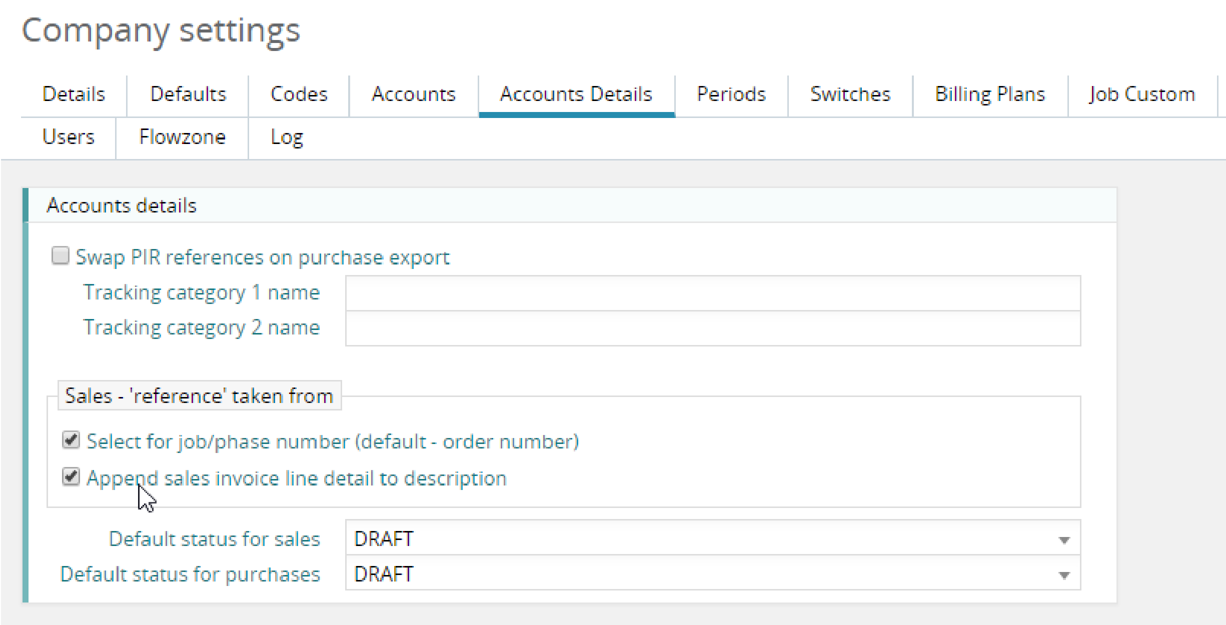
Xero accounts link

2nd reference

Job number is now an option to use as the second reference for sales transactions.

Invoice line detail included in Xero export

New option, specifically for Xero link, to enable this in company settings. This will only apply to invoices made real following the upgrade.



Note: The maximum size of Xero's invoice line description is 4000 characters. Any more text than this will be truncated by Xero.

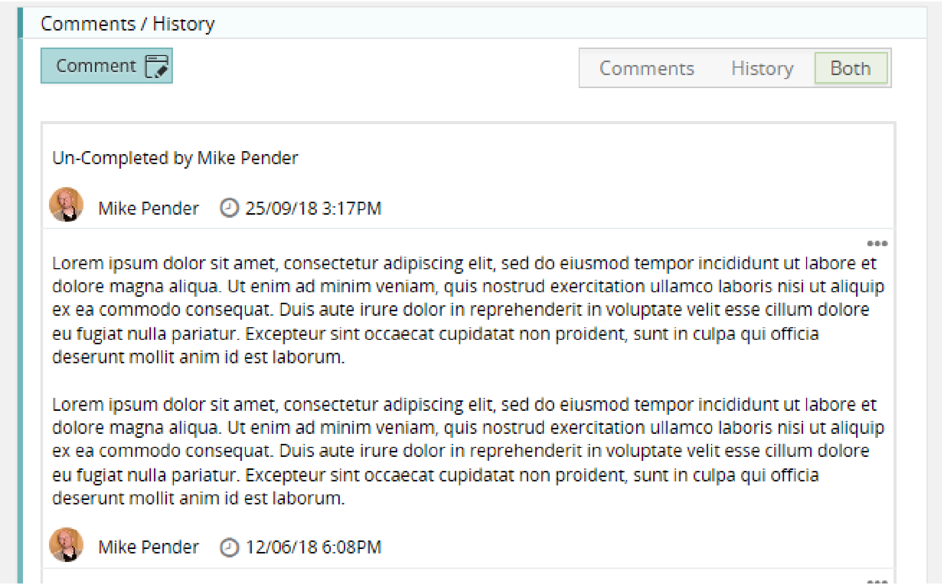
Tax code description field use and Tax Drop downs

Tax/VAT Description field is now displayed when selecting from a list of tax codes.

For Xero users, the internal Xero API code for tax codes was previously displayed. This is no longer shown when selecting from a list of tax codes.

Activity comments - improved design

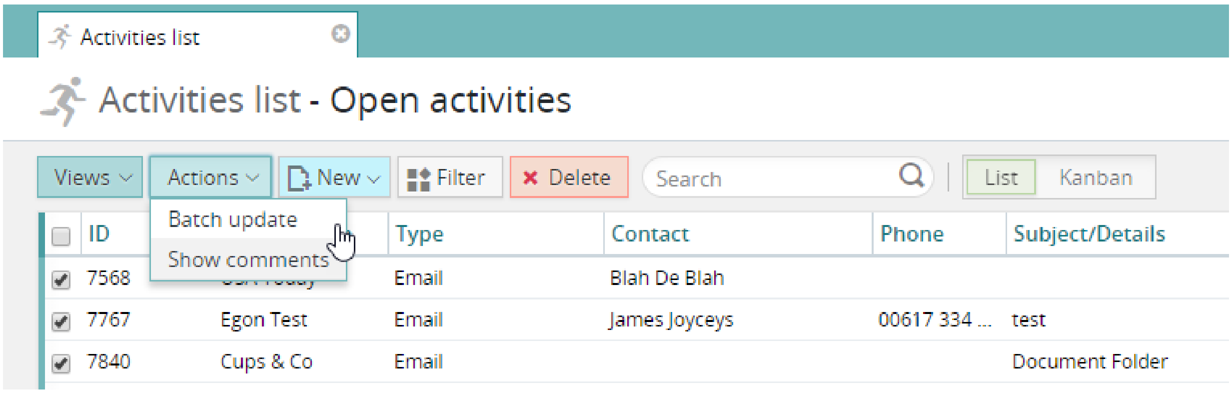
The comments section of activity records has been moved to the main details tab of the activity, and its design improved. The comments list includes both manually created comments and system generated history items. If you wish to only see the comments, select 'Comments' from the three-button selector at the top right.



Batch update

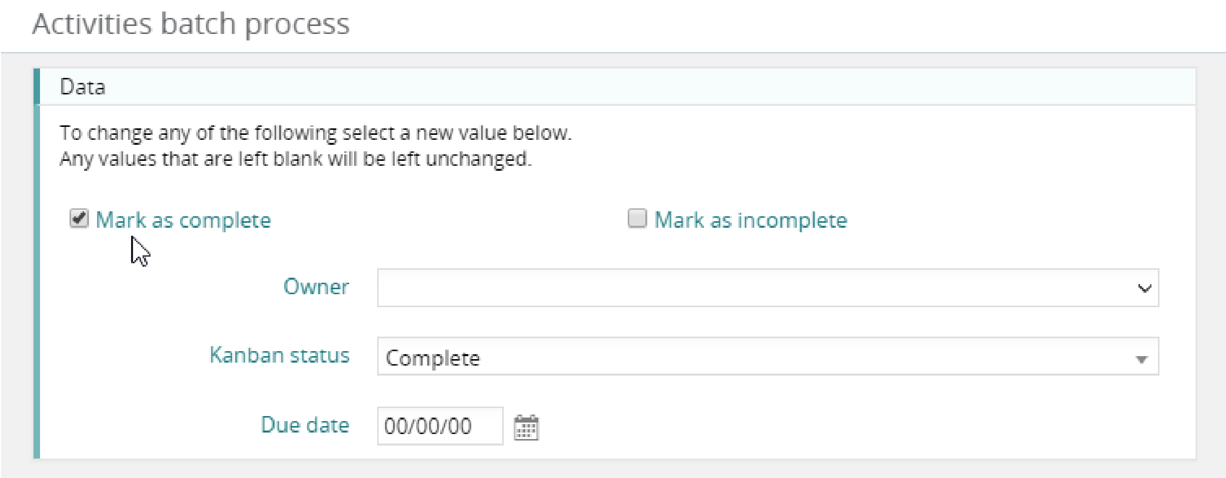
Activities now have a batch update feature

Selecting the records to update



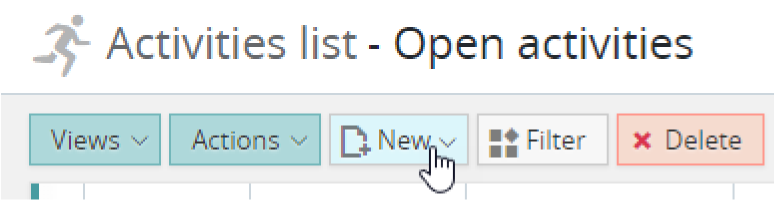
Selecting fields to update

You mark selected activities as 'Complete' by either checking the checkbox or selecting the relevant Kanban stage. It is also possible to change the activity owner or due date.



Create an activity from activity list

It is now possible to create a new activity from the main activity list. On clicking 'New' you will be asked to select a client, and then the activity will be created. If you wish to link an activity to a job or a phase, you would normally create the activity from within the required job or phase record. However, it is also possible to do this within an activity using the new 're-file' feature (see below).



Checklists for activity records

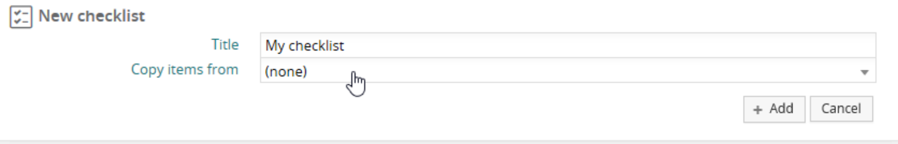
Checklists are a simple method of tracking specific tasks required before an activity record can be considered fully complete.

Activity checklists have the following features

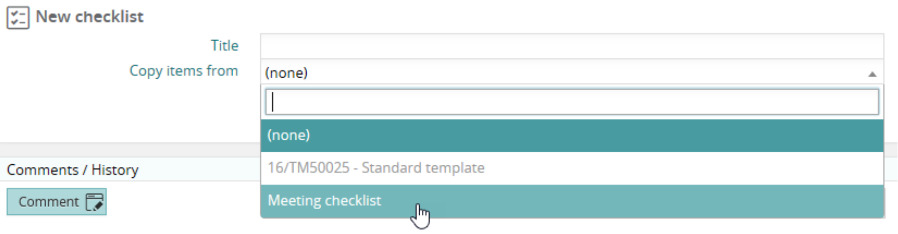
- Multiple checklists can be added to a single activity.
- If a checklist is added to an activity record on a Job template, it appears as a template to select when creating a new checklist. In this way, you can create a set of standard checklists.
- Checklists are very easy to create - the interface is designed to rapidly create a list of items.
- Ticking a checklist item marks it as 'complete', and puts a strikethrough the item description.
- You can hide completed checklist items.

Creating a new checklist

Click' New checklist' and enter a name for your checklist.

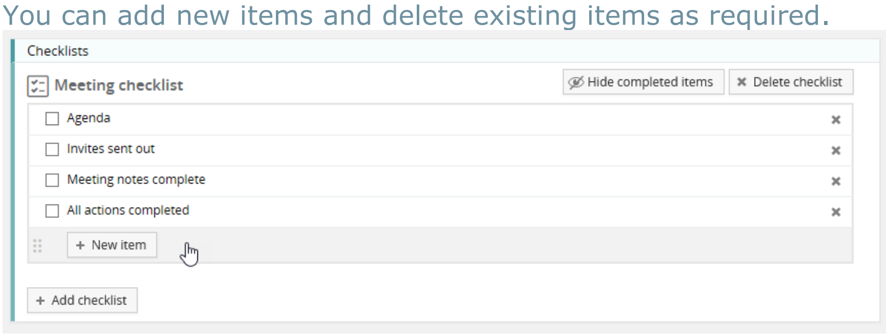


Optionally – select a template …



Your checklist

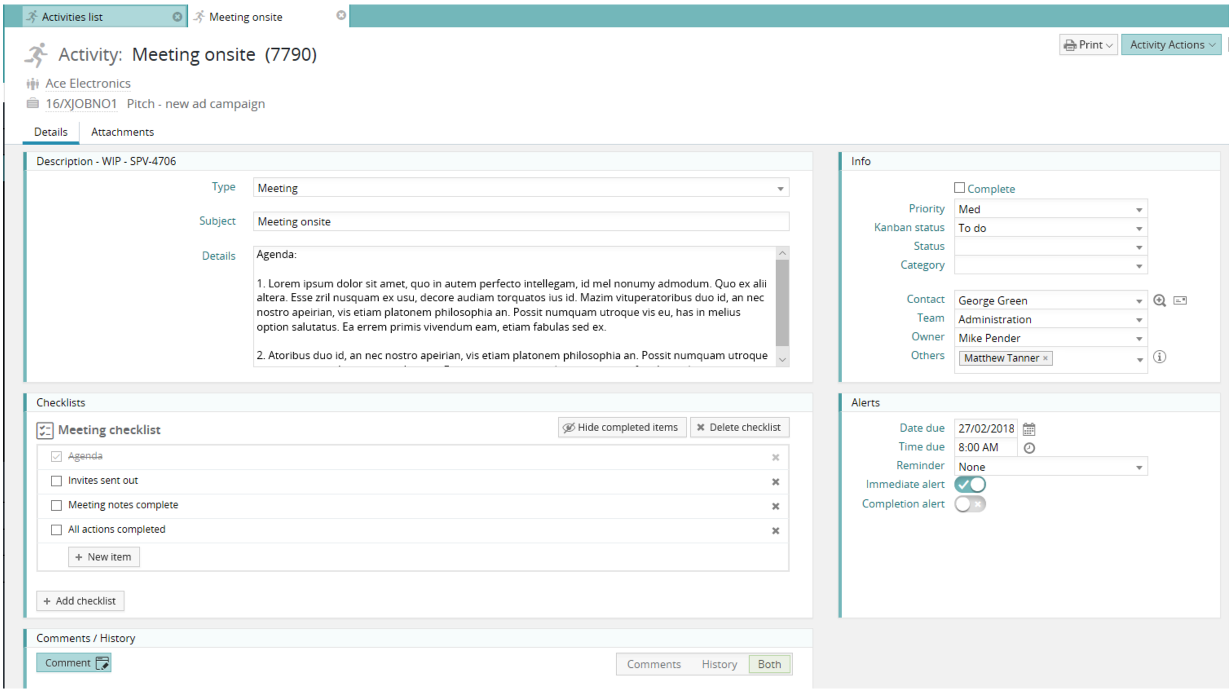
You can add new items and delete existing items as required.



Activity form re-design

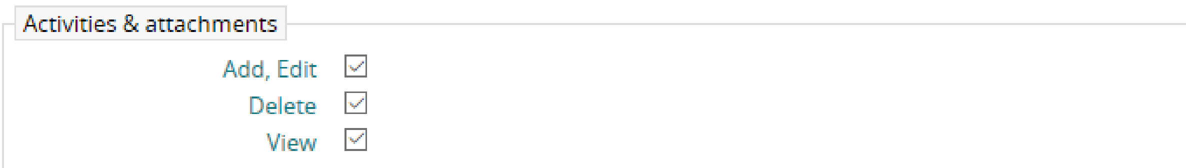
The activity form has been redesigned in order to better support some of the new features.

- Larger area to enter details
- Info panel – all key fields in one place
- New panel to handle checklists
- Comments moved to the details tab



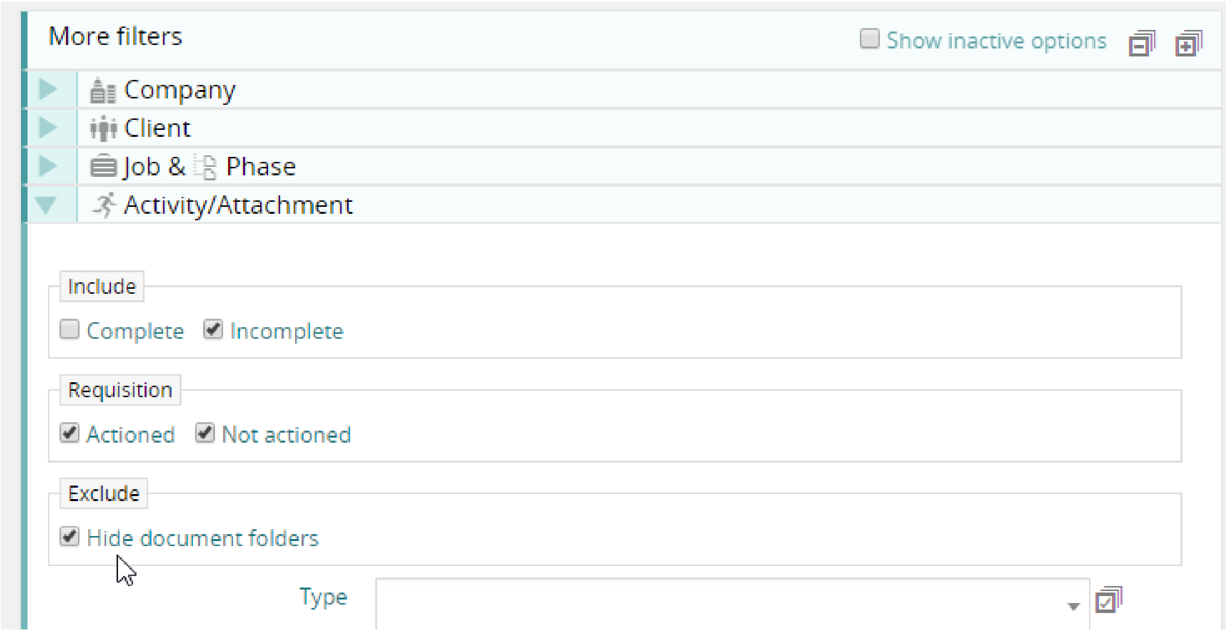
Permissions

It is now possible to set a user or group permission for deletion of attachments & activities.



Document folder activity types

Document folders in Synergist are activity records that are used to reference one or more attachments. For most users, seeing this type of activity in the activity lists is unnecessary. We have therefore hidden this type of activity from all the standard system views. If you have any custom views, these are unaffected by this change. If you would like to amend your custom views to hide document folders, you will need to use the ‘filter’ option and re-save your views.



Attachments

Synergist HTML documents

Synergist already supports the attaching of existing external documents to various areas of Synergist. E.g. Activities, Client, jobs and phases.

It is now possible to **create** a new document inside Synergist. In this case, the 'document' is a special HTML one. This 'Synergist document' is editable within Synergist, utilizing the new built-in document editor.

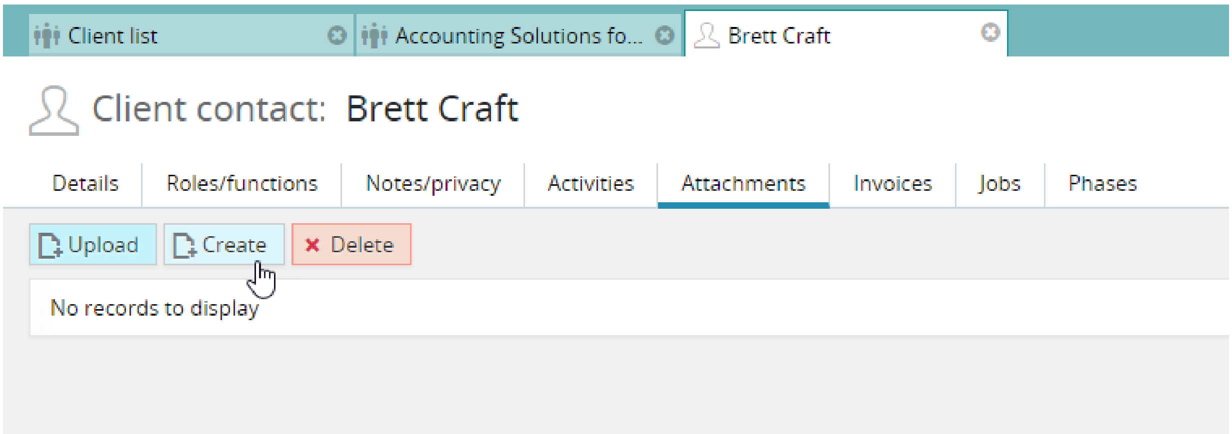
These documents are not designed to be accessed externally to Synergist. If you wish to send the document to a client or colleague, you simply click the PDF button, and download a PDF version of the document.

Synergist provides a new fully-featured WYSIWYG editor that handles images as well as formatted text. It also provides an image editor.

Administrators with access to File Maintenance, can also create Synergist document templates. These document templates can include special fields, which are merged into a newly created document to include client or job information.

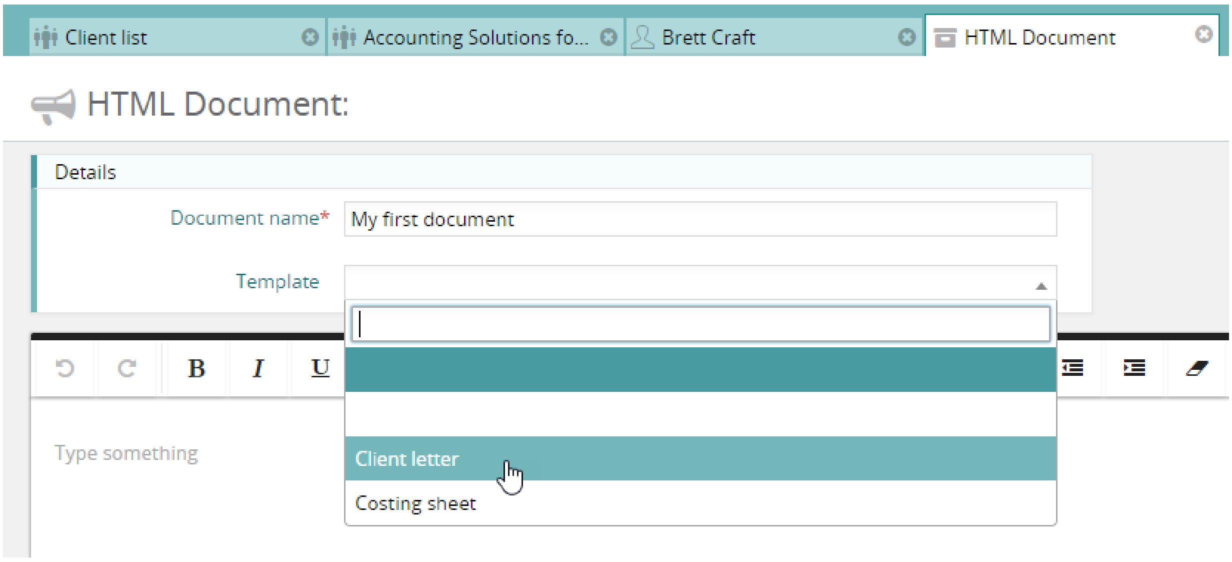
Creating a new 'Synergist document'

A user can create a document from any attachments tab in Synergist. In this example, we will create a document from a client contact record.

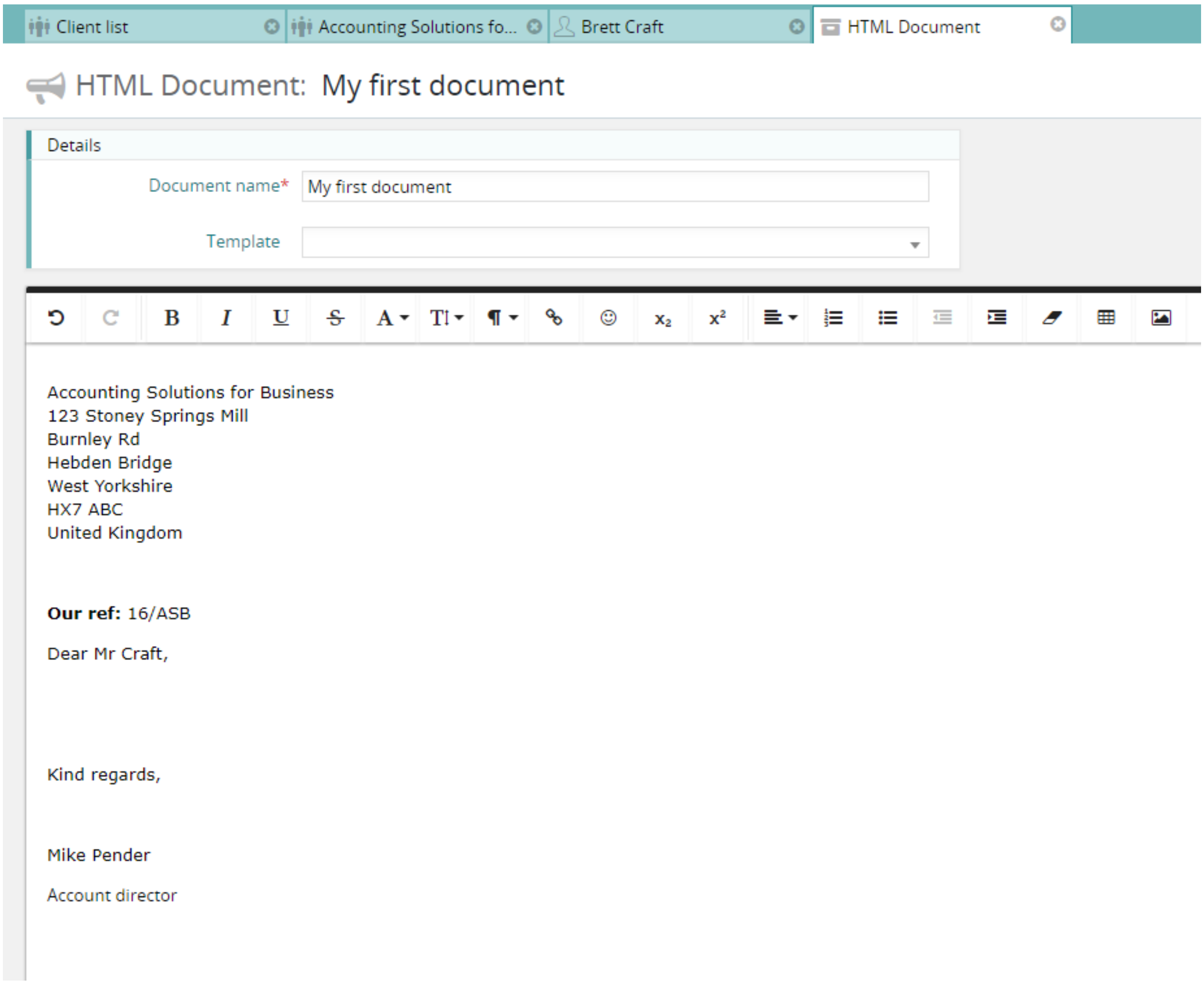


Selecting a template

The user can now simply type in text, or select to insert images – similar to working in a Word document. However, he/she might wish to first select a document template to base the new document on and automatically fill out/merge any fields contained in the template.



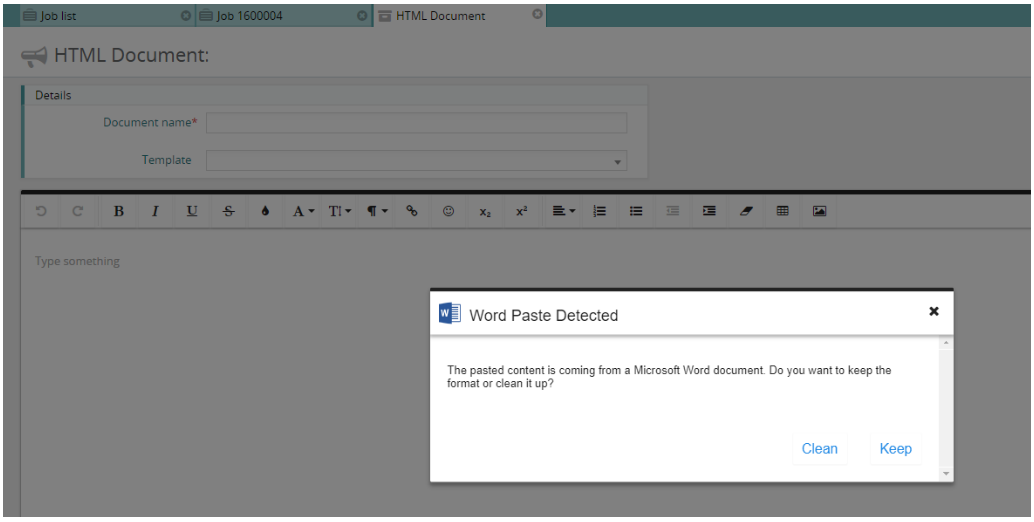
The template loads, and any fields in the template are automatically replaced with Synergist data in the new document.



Pasting in a Word/excel document

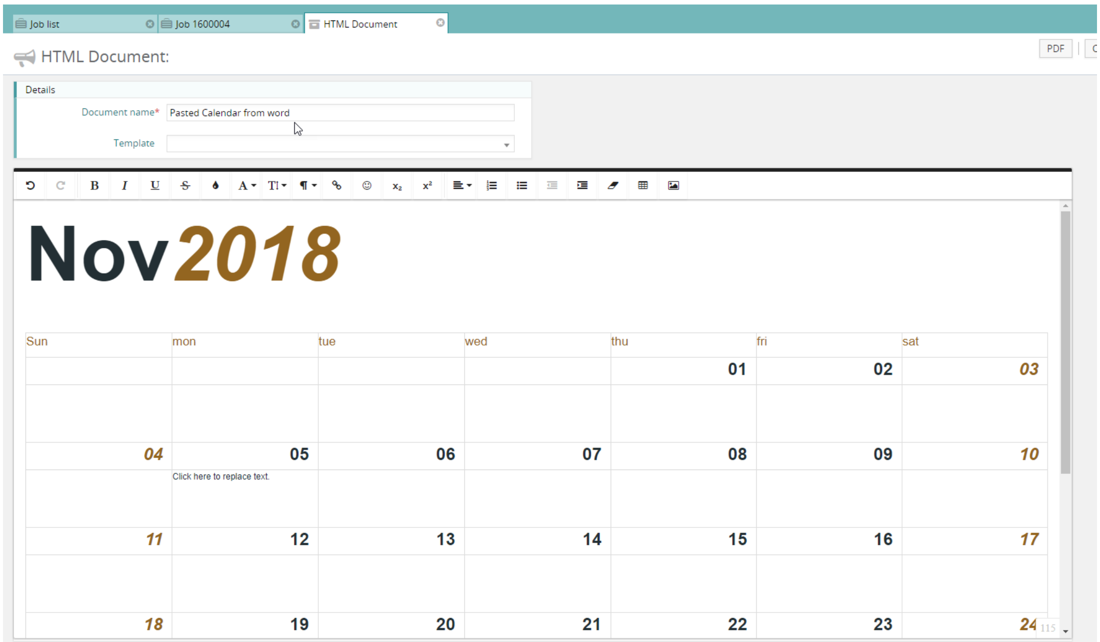
If you open a Word or Excel document and copy the contents to the clipboard, you can then paste this data into a Synergist document.

Synergist will ask if you wish to keep the Word formatting or clean it up. If you clean it up the document will have less redundant markup – but will have less of the original formatting.



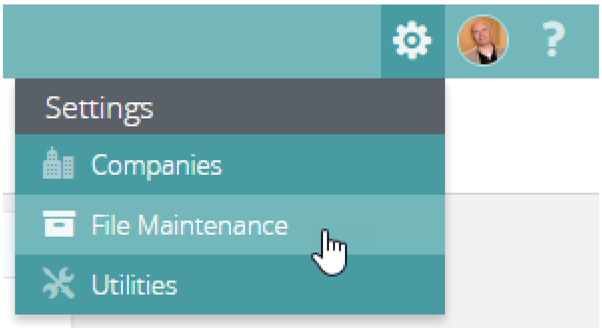
Example:

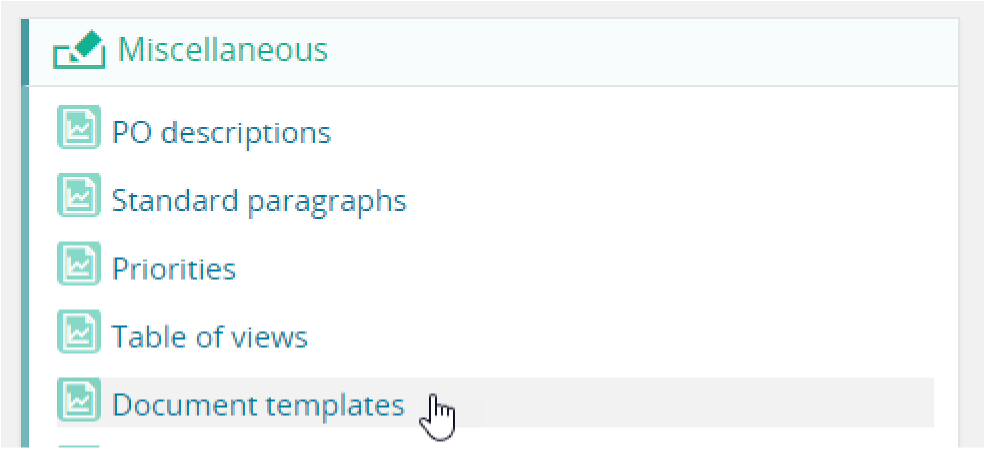
Resulting document – after pasting in a calendar from a Word document



Creating a template

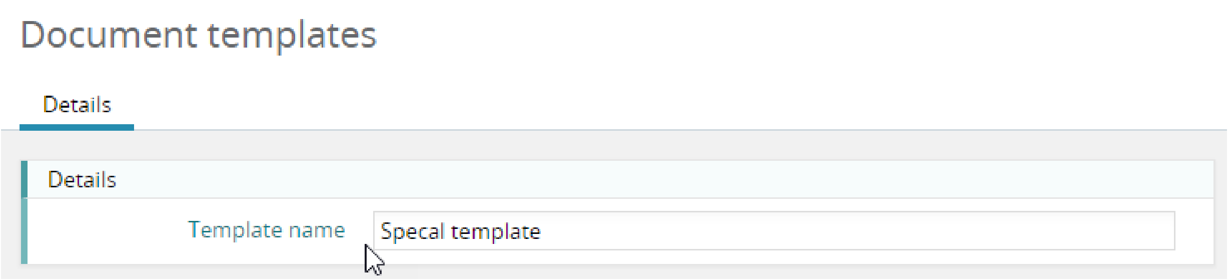
Users with File Maintenance access rights are able to create document templates. To create templates, select 'File Maintenance' from the cog menu.





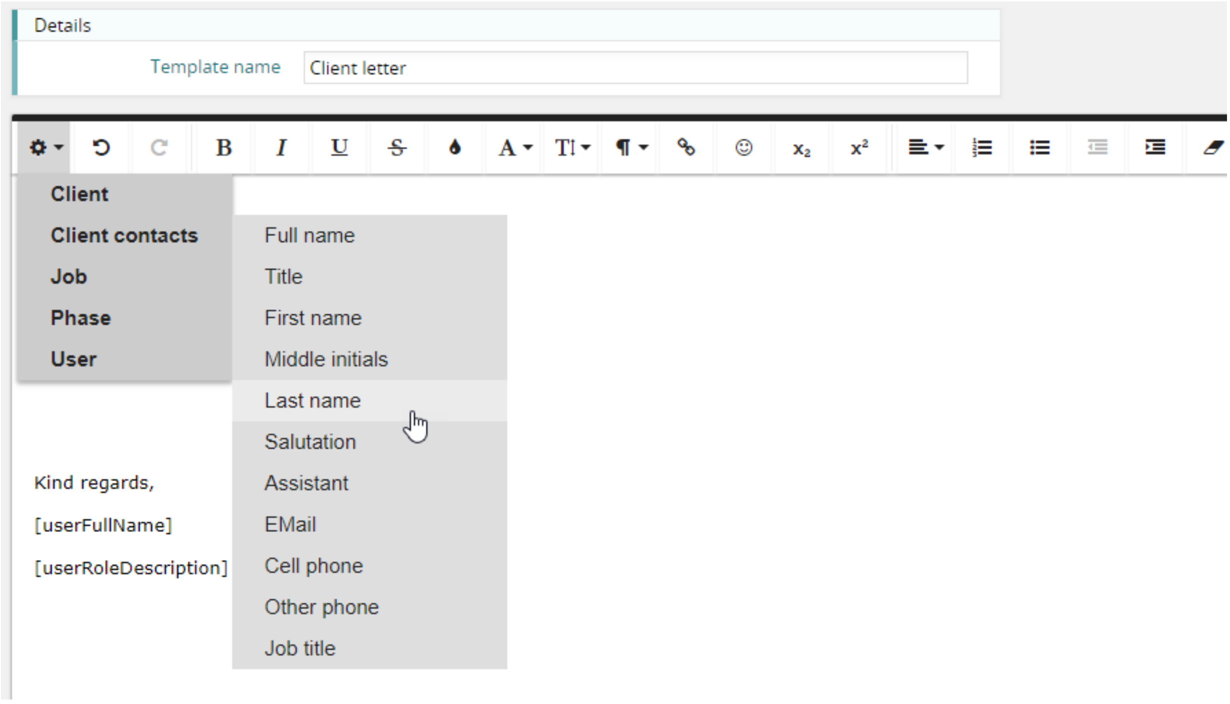
New template

Click 'New' and give the new template a name.



Adding text and fields

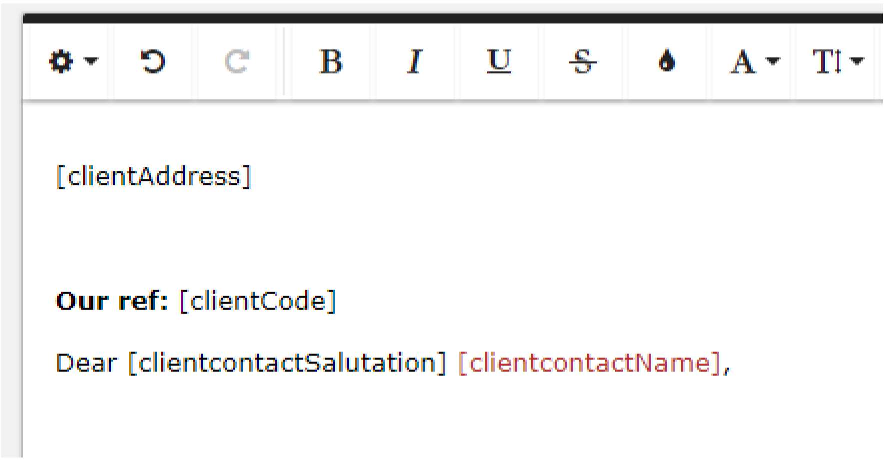
From here, you can now add standard text and embed fields.



Embedded fields

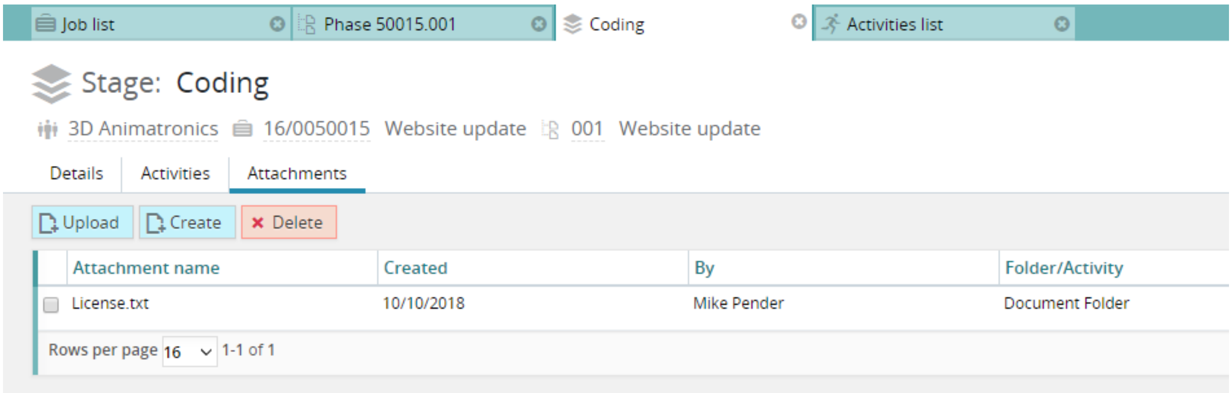
A new field has now been added to the document template (see field marked in red). When a user subsequently selects this template to create a new document, the contact name will be automatically inserted into the document.

Note: Not all fields are available when using a template. For instance, you will need to create a document from within a job to access a job number.



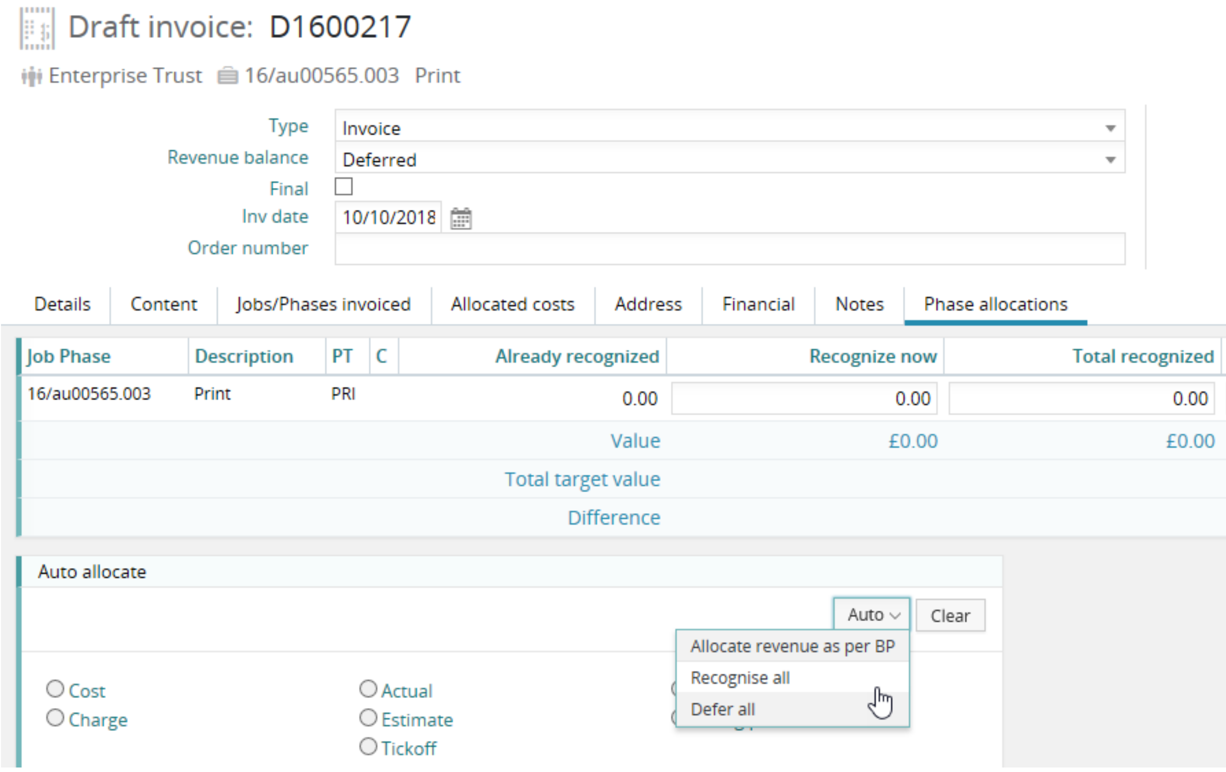
Stages 'attachments' tab

Documents can now be attached to stages of a job/phase.



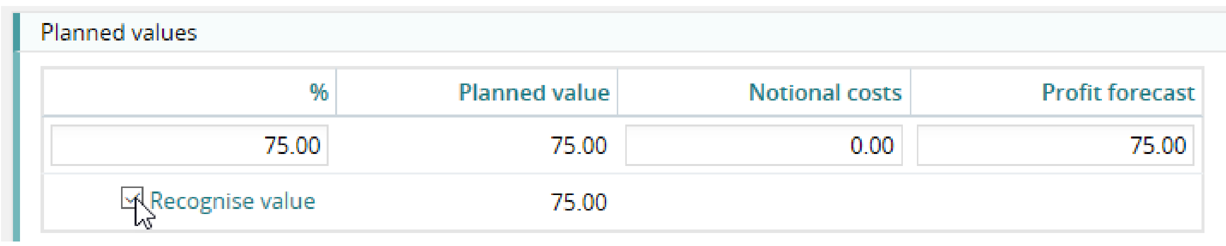
Invoicing from billing plans

For companies that are using revenue recognition, by default the 'Auto' button would previously allocate revenue in accordance with what was specified in the billing plan. Now there is an option to override this default behavior using the new defer/recognise actions.



Billing Plans - recognise value

The recognise value of a billing is now, by default, the same as the planned value. It is also synched to this value so any change in the percentage planned affects both figures. If you now wish the recognise value to be independent of the planned value, tick the checkbox – the recognise figure can then be overridden.



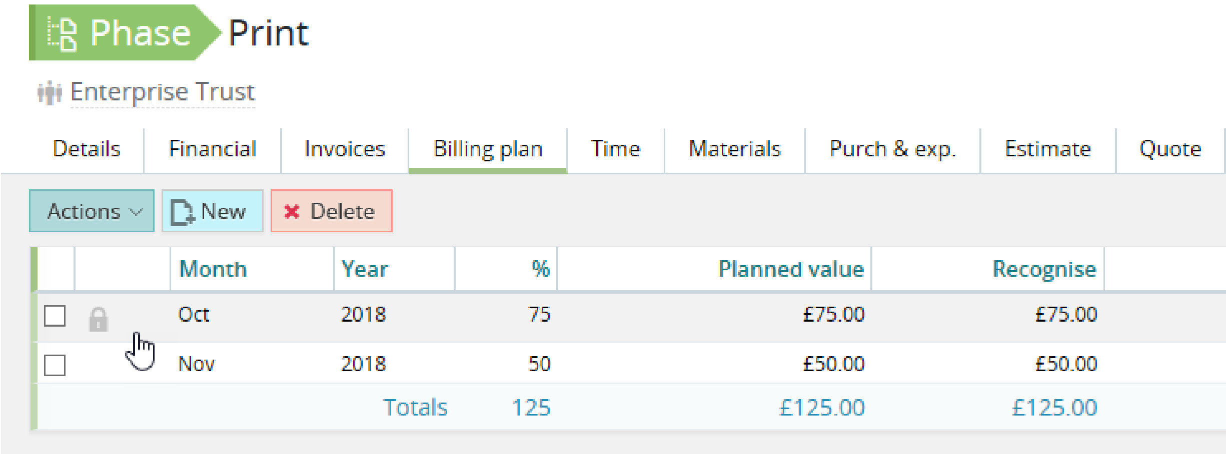
Locking / adjusting billing plans

Billing plans are used to create a plan of how much and when you plan to invoice a client (or recognise revenue) for a specific job or phase of a job. Typically, this is based on a percentage of the quoted value – broken down over several months. Individual billing plans can be used to generate invoices, credits or revenue transactions.

We have introduced a new feature to billing plans that enables users with the required access level to lock and unlock billing plans. In addition to this, the system will automatically lock a billing plan against any changes once it has been used to generate an invoice.

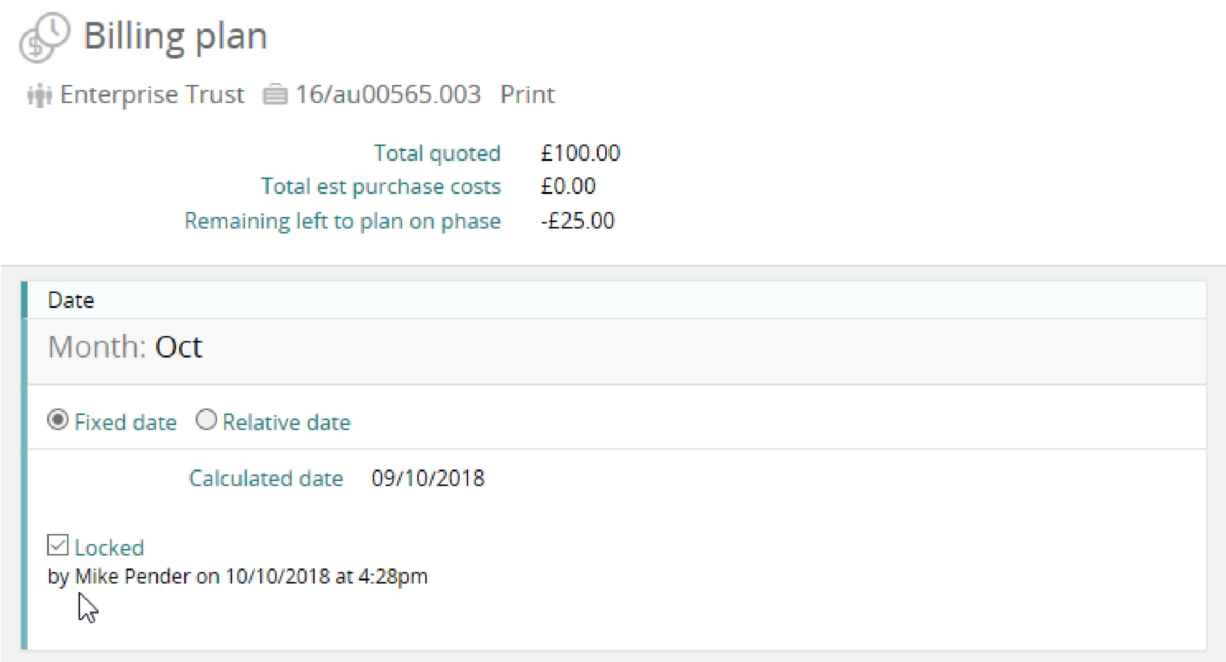
Locked billing plans

You can see if a billing plan is locked by looking at the billing plan list on a job/phase. Locked billing plan items have a padlock visible.



Locking/unlocking a billing plan item

This is done using the checkbox on the billing plan.



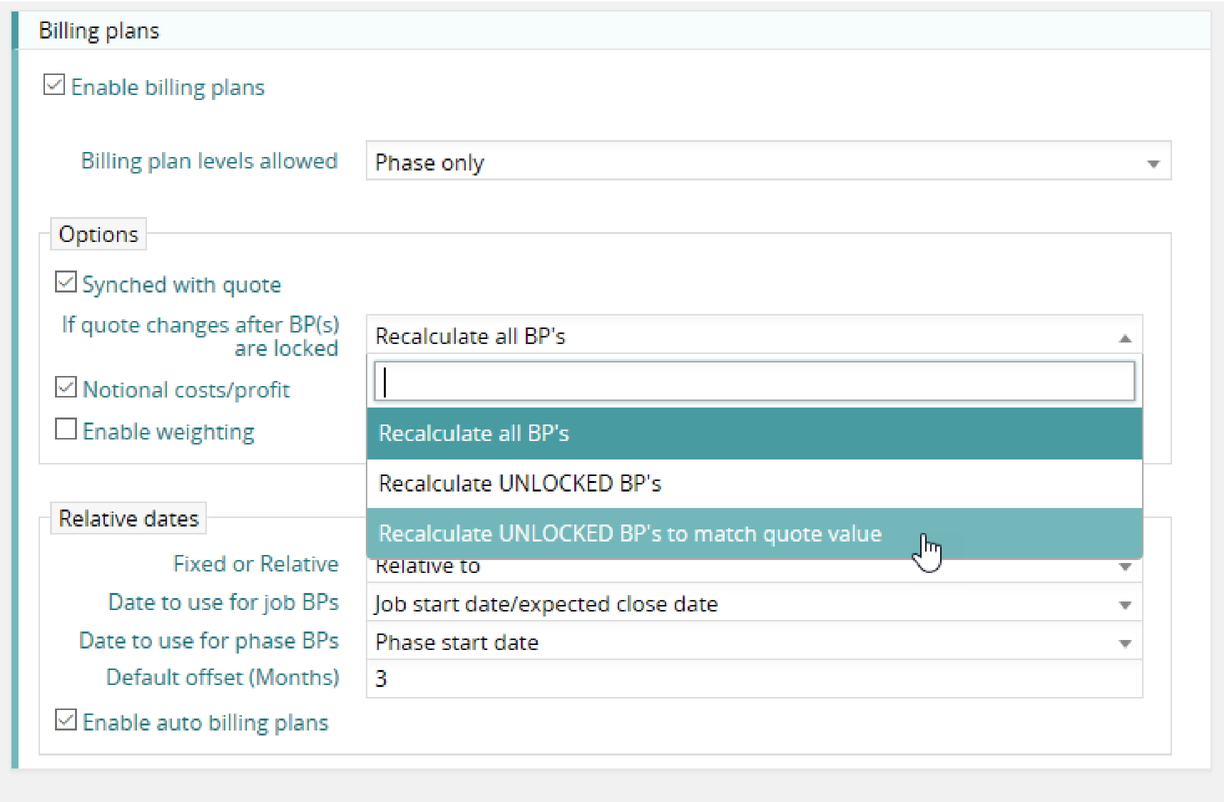
Recalculating a billing plan

If you have locked a billing plan item, for instance, you may have billed one of the items in the plan; there is a dilemma if the total quote for the job or phase changes. You need to decide whether the entire plan or just the remaining part of the plan is to be updated to take into account the change to the quote. How the system behaves depends on a new company setting.

The options are these:

- Recalculate all BPs (the current behavior and the default)
- Recalculate unlocked BPs
- Recalculate unlocked BPs to match quote value

Company settings – billing plans page



Example of how this will affect your billing plan

Quote originally £1000, now changed to £2000

1. Current behavior - recalculate all BPs

50% £1000
20% £400
30% £600

2. Recalculate unlocked BPs

50% adjusted to 25% - £500 - planned value stays the same
20% £400
30% £600

Total 75%

User needs to either add a new BP for 25% or adjust the unlocked BPs
Unplanned value £500

3. Recalculate unlocked BPs to match quote value

50% adjusted to 25% - £500 - planned value stays the same
20% adjusted to 32.5% (half of the "25%") - £650
30% adjusted to 42.5% (half of the "25%") - £850

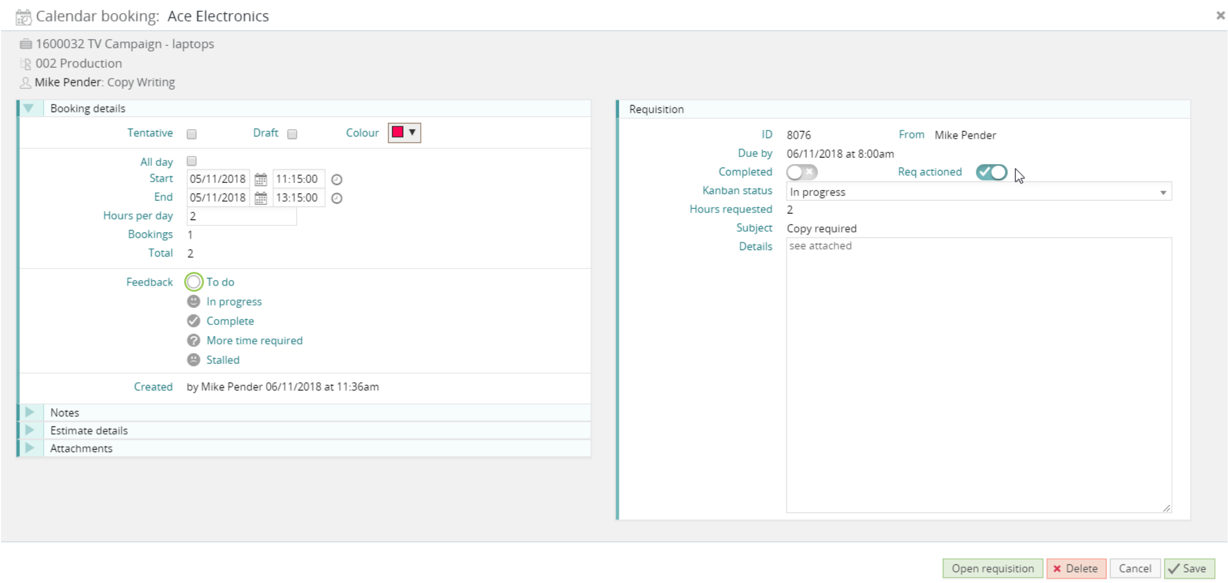
Total 100%

Requisition actioned slider

If you are using requisitions, a new option is available to help with the workflow of the requisition process.

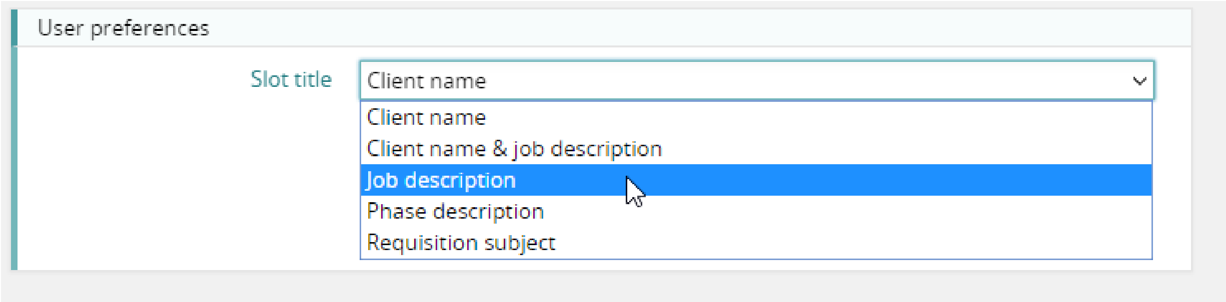
Typically, an account handler will raise a requisition for some work for a job. This appears as a requisition in the calendar requisitions list. Once work has been allocated to member(s) of staff, the handler would ideally wish to know that the request has been booked into the calendar. This is done by setting the 'Req. actioned' slider from the calendar booking.

Note: This will also impact the new Kanban feature (see below), since actioned requisitions are displayed with an amber tick in the Kanban chart. You may also wish to move the requisition to the next Kanban status.

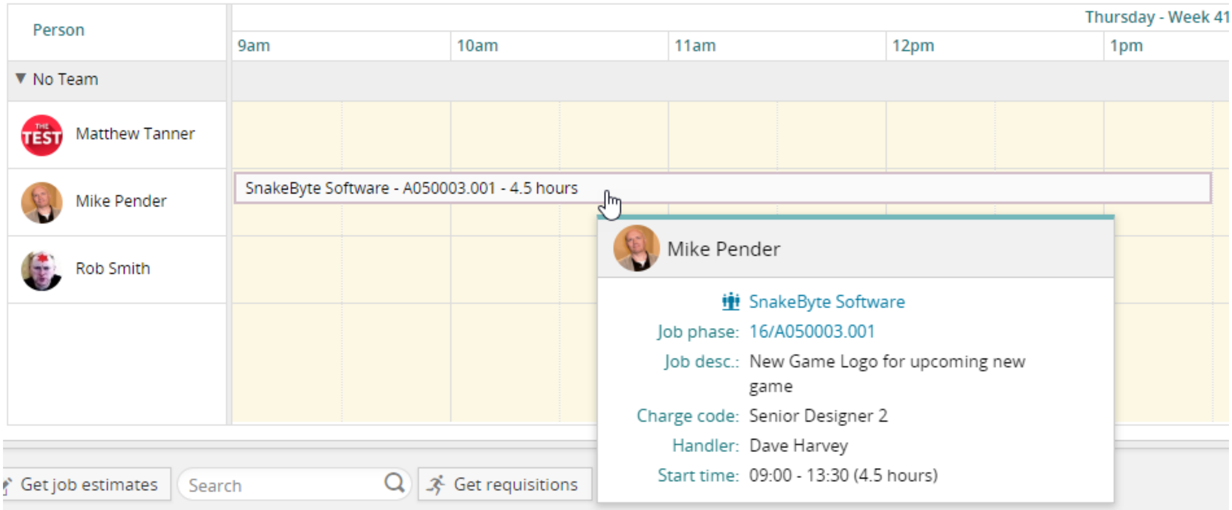


Booking descriptions

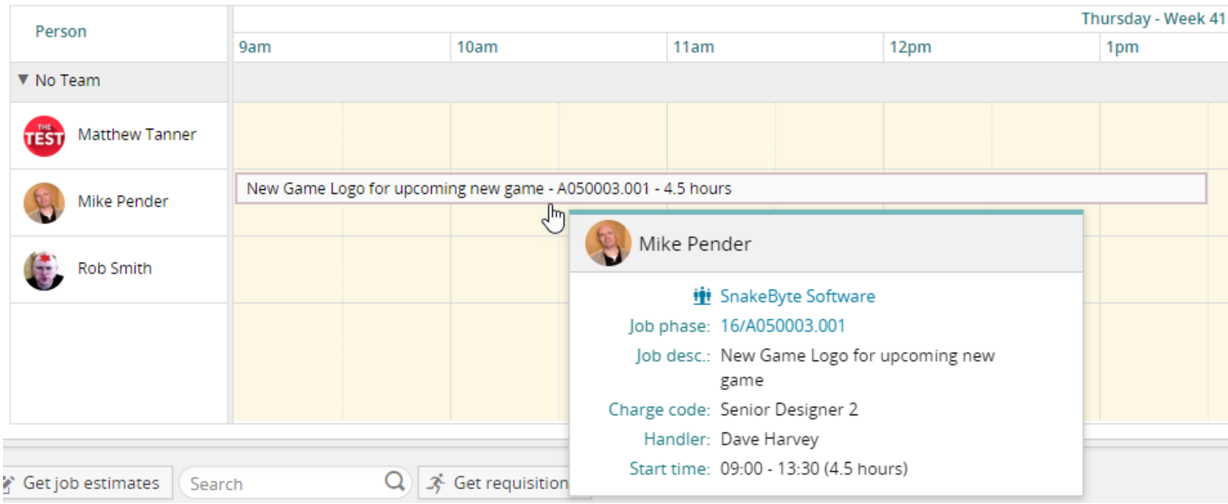
Previously the calendar would always display the client name and job number against all bookings. We now provide user settings that provides various options. This is particularly useful for companies who tend to do a lot of work for a single client – where the job description is more important than the client name.



So this standard description …



Can become this – job description …



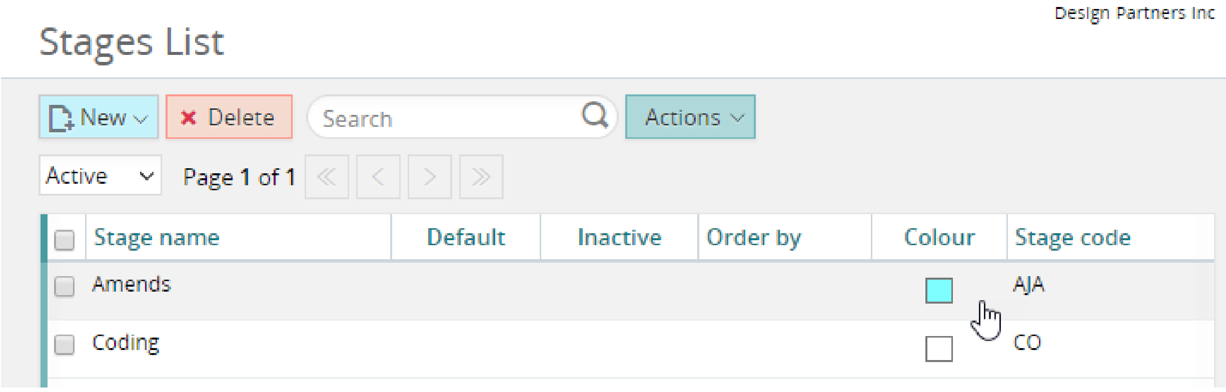
Colour from schedule stages to show in calendar

Previously only the current stage of a job/phase would affect the automatic colouring of calendar bookings. Now this feature has been extended to handle the stages of two tier style jobs, so bookings based on estimates that are linked to a stage from a schedule of stages will now appear with the colour associated with the appropriate stage.

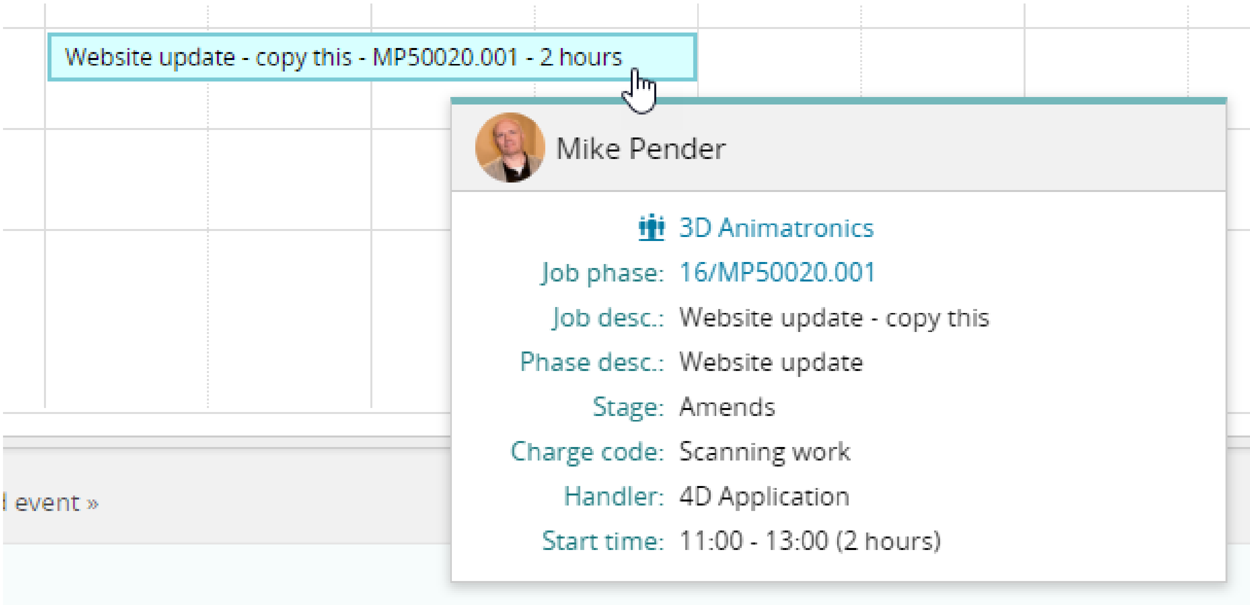
Note: 'Current stage' still takes precedence, so to use this feature 'current stage' should be disabled in company settings.

Example:

A colour has been set against the 'Amends' stage (in File Maintenance).

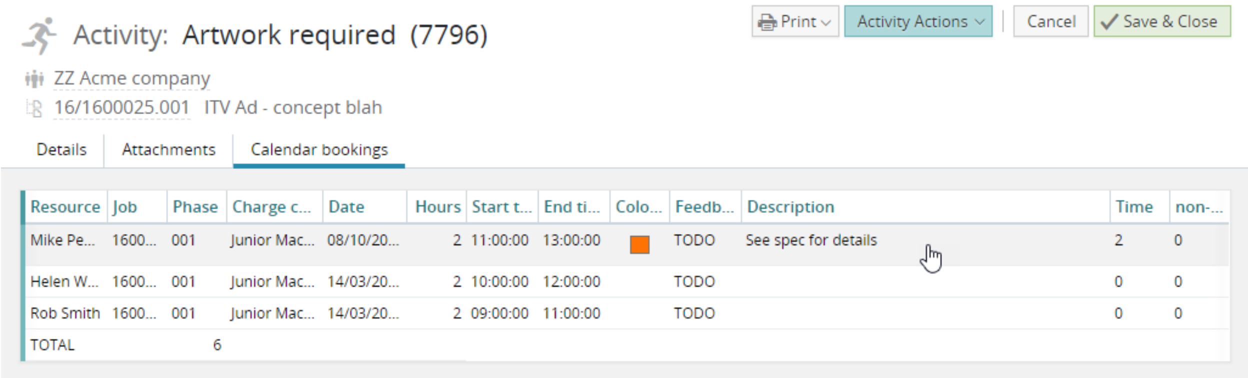


Bookings now appear in that colour if the estimate is for the amends stage.



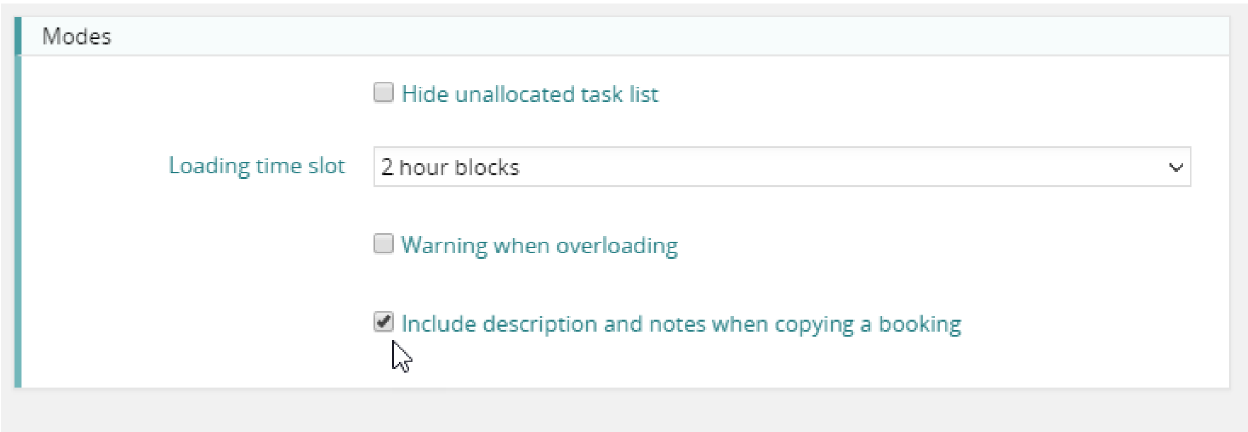
Timesheet data visible from a requisition

Requisitions, which are a type of activity record, now display calendar-booking information that includes the total of timesheets posted.



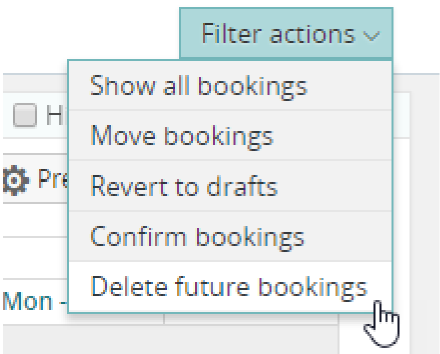
Copying a booking

An option has been added to copy booking description and notes (in calendar user preferences).



Deleting future bookings

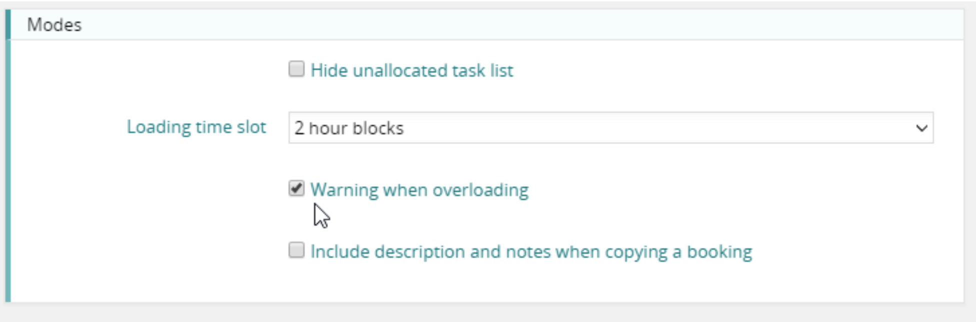
If a job is cancelled or delayed after being booked into the calendar, you are now able to delete all the future bookings for this job. To do this, simply filter the calendar to a single job and select this option from the Actions menu.



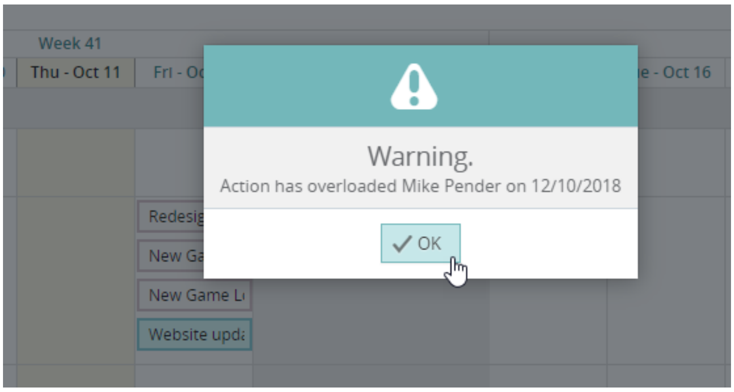
Loading warning

The calendar has a new feature: 'Warning when overloading'. This feature is off by default but can be activated via the calendar user preferences section. If this feature is active, the user is given a warning if a calendar item that has been dropped or moved overloads the staff resource.

Calendar preferences

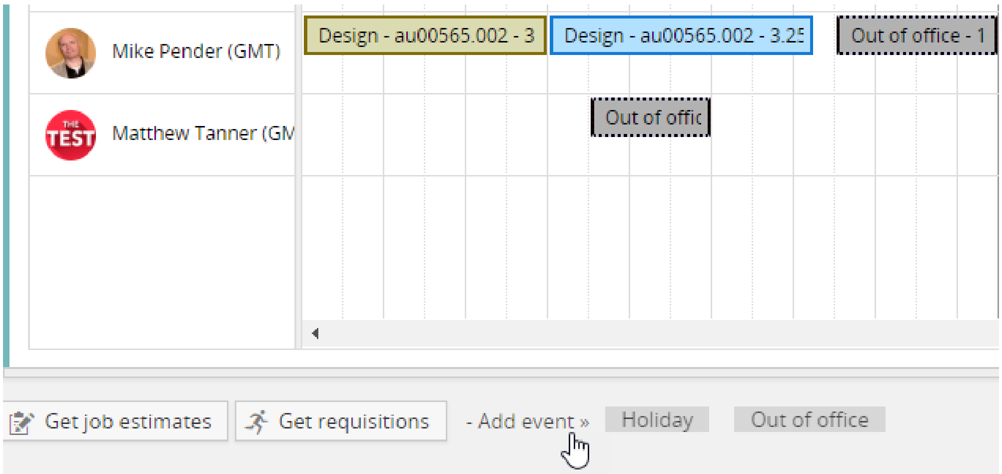


Example of use



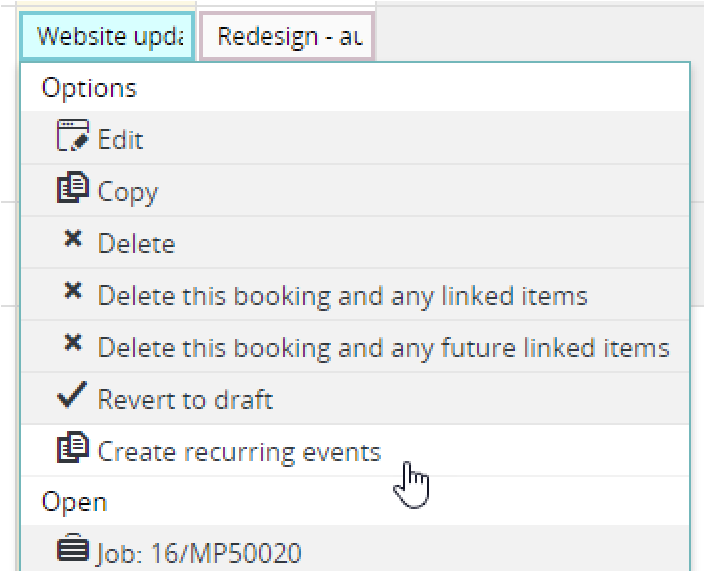
Add event

A new feature 'Add event' is now available. This feature has been provided to make it easier to create booking events for holidays and sickness. Instead of selecting estimates on 'holiday jobs' from the main list, the Traffic manager can drag from this list of special charge codes. For more information on this feature, see the section 'MyCalendar'.

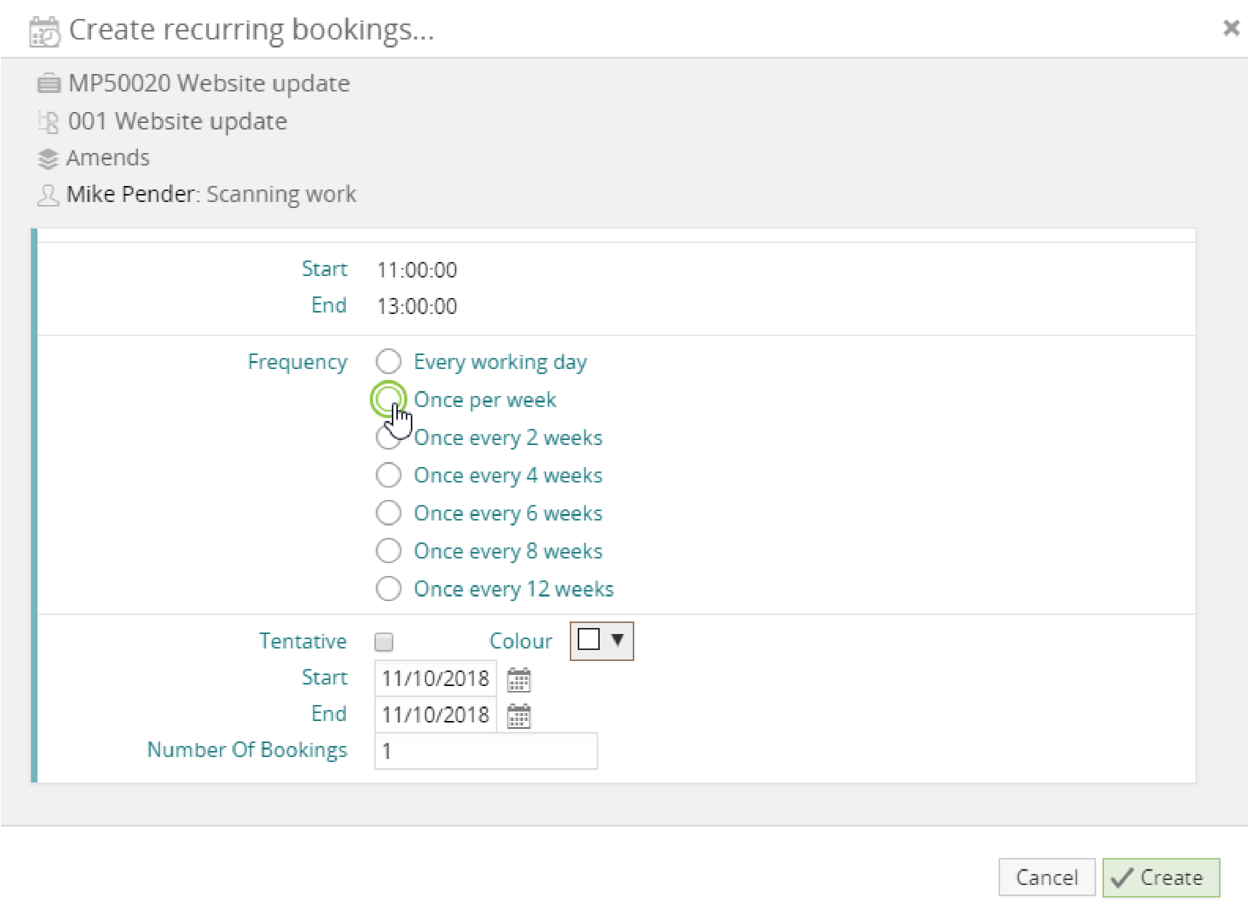


Create recurring events (Paste special)

To use this feature, first create a booking and then right-click that booking. Select 'Create recurring events'.



You can create recurring bookings based on the booking you originally selected. Various options are available.

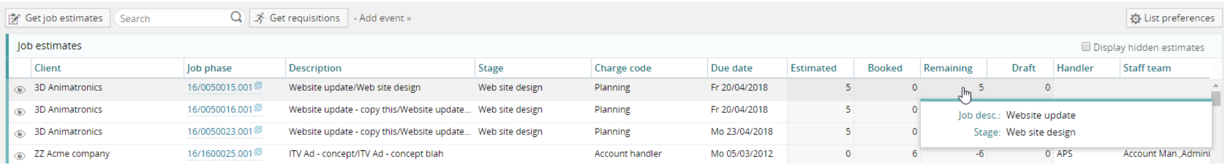


The calendar bookings estimate list

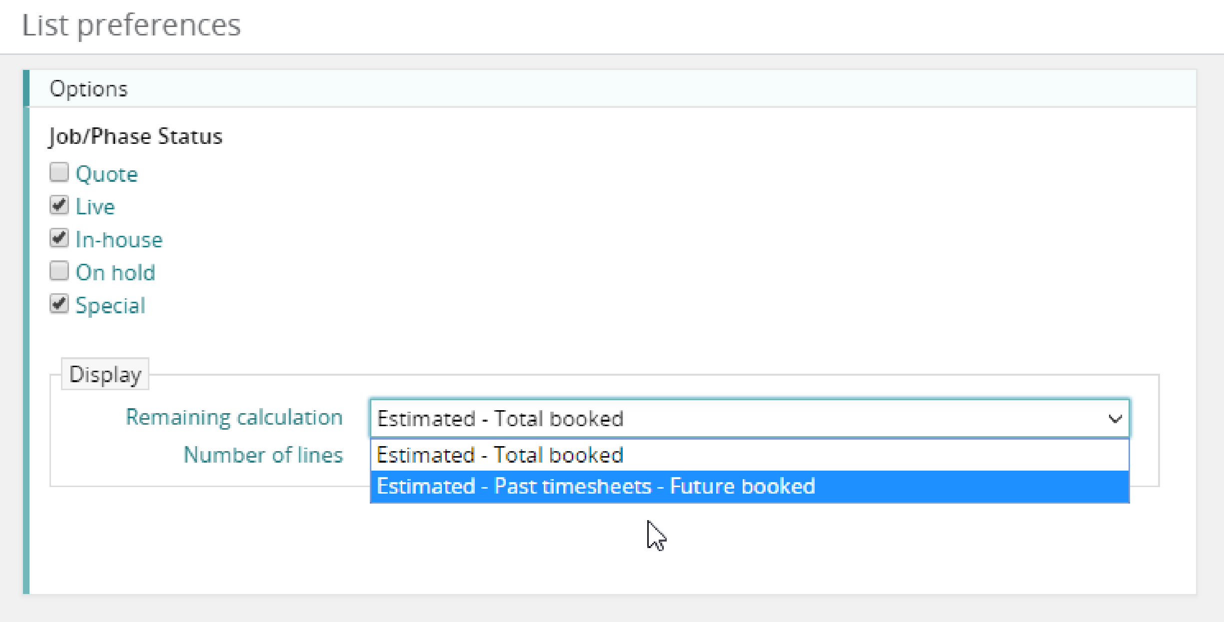
The 'remaining to be booked' column

The remaining column was previously calculated as 'Estimated, less Total Booked'. This figure was not satisfactory for some users since it did not take into account work completed (i.e. timesheets) or bookings left uncompleted in the past.

There is now an optional calculation that can be used to calculate the time remaining to be booked. The new calculation is 'Estimated, less Past timesheets, less Future booked'.

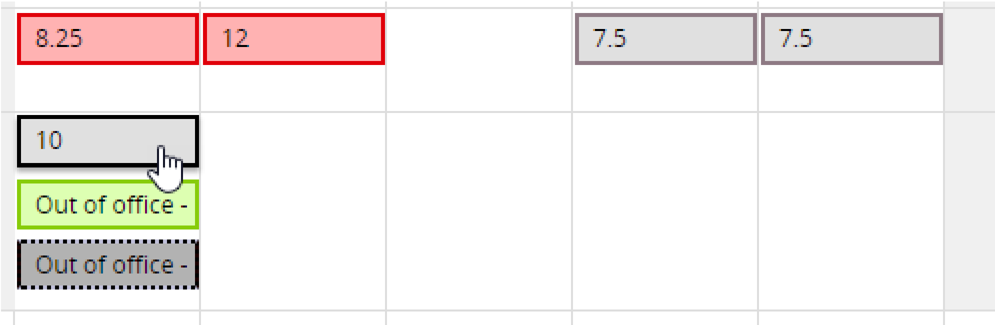


To select this calculation, open the list preferences on the calendar bookings screen.



Out of Office

If bookings consist of 'out of office' charge-codes, these now display as grey when the loading view is active. All other types of bookings use the red/amber/green colouring. In this way, it is easier to identify holidays etc. that appear fully booked but really represent no work being booked for the period.

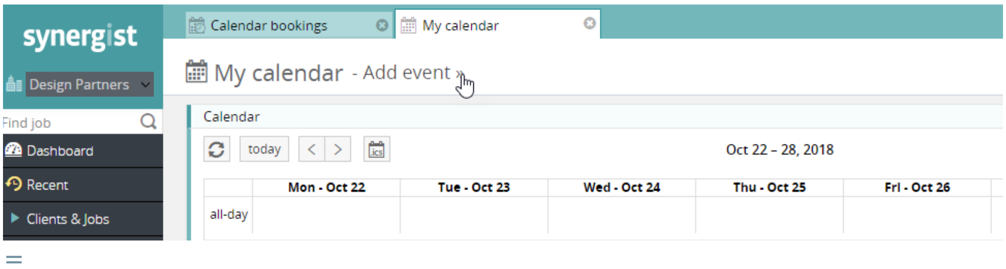


Add event

MyCalendar users can now book events into their own calendar. This is restricted to special jobs and charge-codes. This feature enables users to create tentative bookings for holidays, sickness and other non-job related activities.

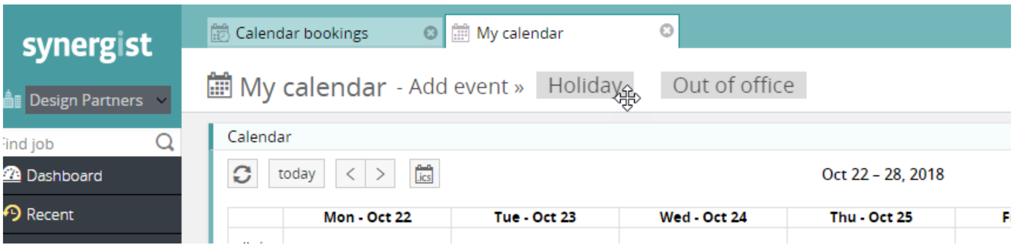
Using the feature

The user clicks the 'Add event' button at the top of the calendar



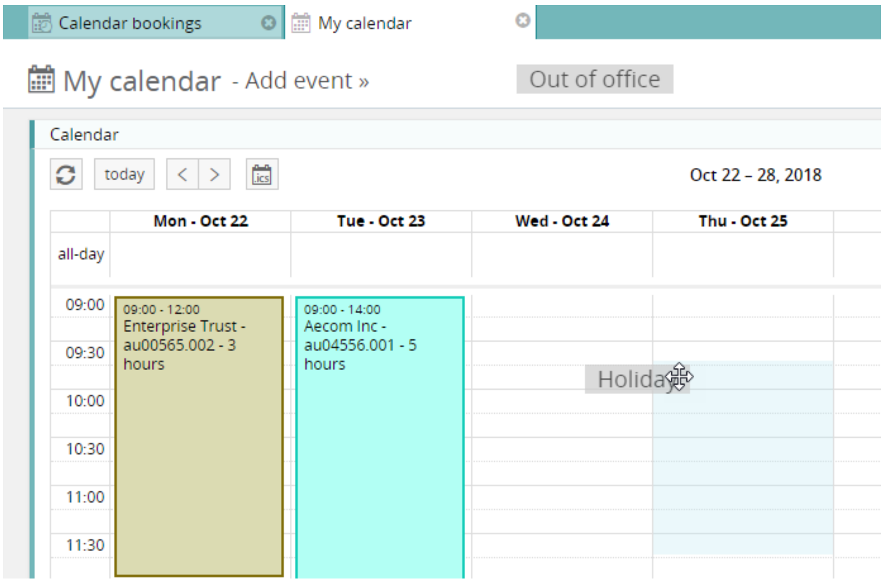
Select a charge-code

The list of available charge-codes will then appear.



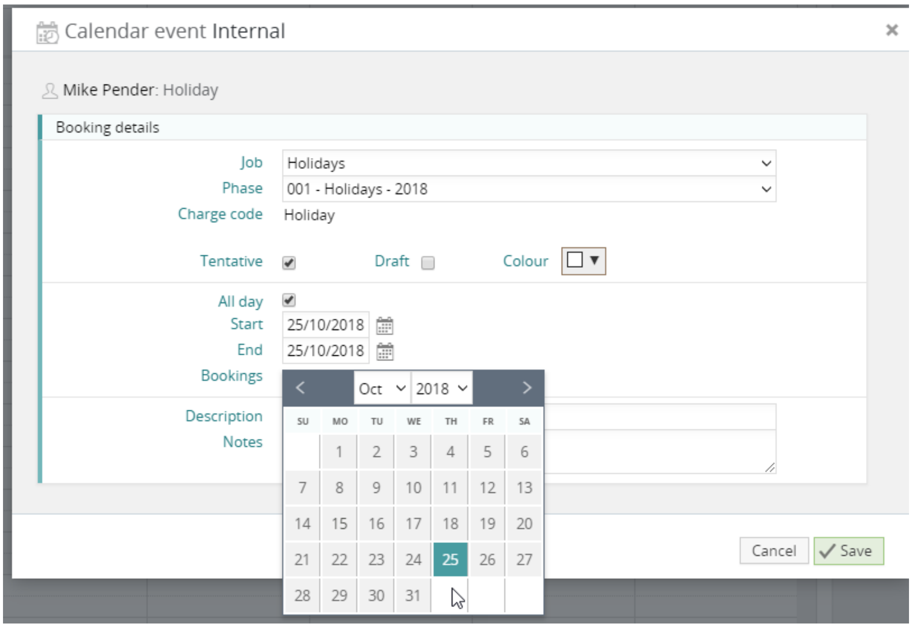
Drag to the calendar

One of these items can then be dragged to the calendar.



Booking input screen

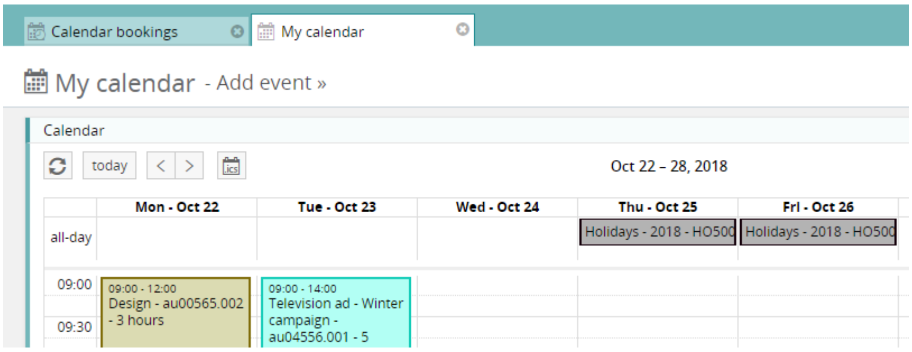
A floating window will then appear where the user can specify the number of days of the event, description etc.



The calendar screen

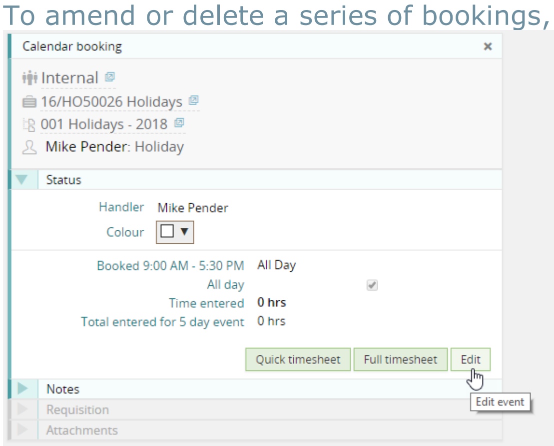
The bookings will then appear in the calendar.

Note: By default, when booking across non-working days and weekends these days remain unbooked. If you wish to specifically create a booking on a non-working day, you must drop the item directly on the non-working day.



Amending or deleting a booking

To amend or delete a series of bookings, click the 'Edit' button



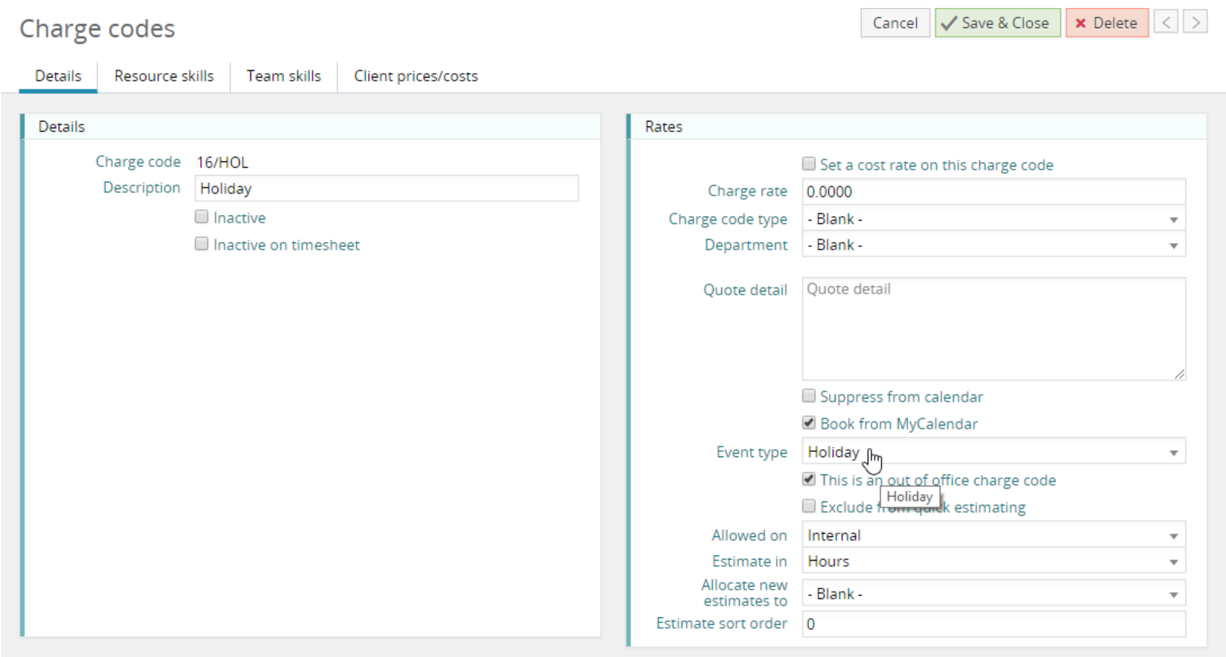
Setting up charge-codes for the MyCalendar 'Add event' feature

Only special charge-codes are available for this feature. You should only create a limited selection of these since they all appear at the top of the calendar.

Charge-code for booking into MyCalendar

Create a charge-code (or use an existing one) and select the following fields:

- Select '[ ] Book from MyCalendar'
- Select 'Event type' ('holiday' or 'other')
- Typically set this as an 'Out of office' charge code
- Select internal jobs



Creating a job to activate a special charge-code

You will then need to create a blank estimate on at least one job. This is necessary since every booking in Synergist must be allocated to a job phase.

Note: If you allocate the charge-code to more than one job, the user will have to select one of these when they create the booking.

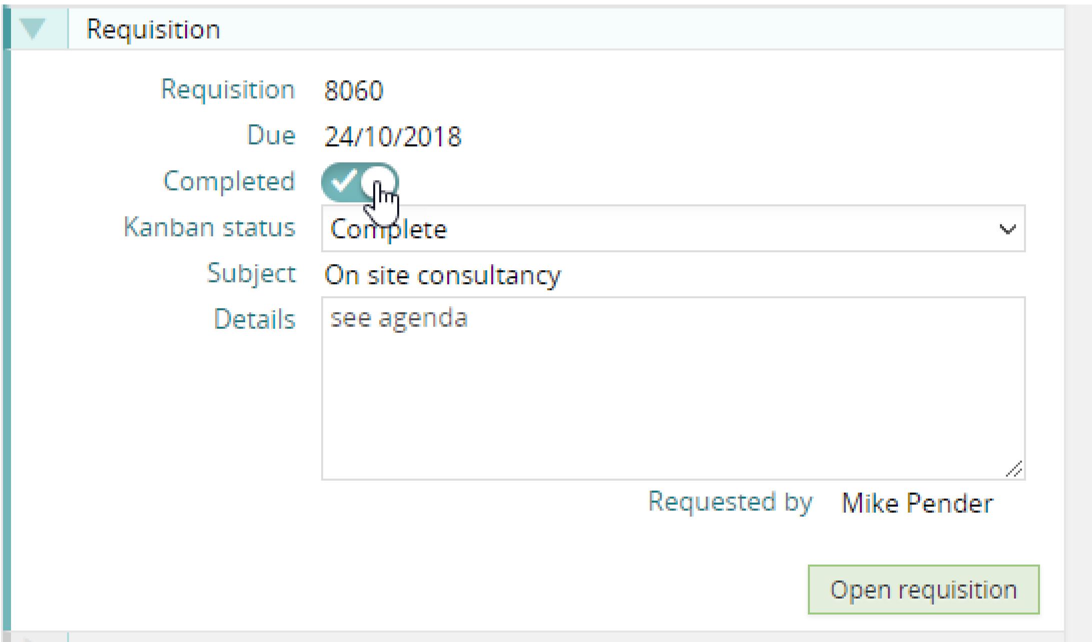
Processing requisitions in MyCalendar

Users who have had work booked into their calendar via a requisition have the option to mark a requisition as completed. Obviously, a user should only do this if he/she is sure all the work related to the requisition is complete.

Kanban boards are now available in Synergist, so it is now important that not only are requisitions marked as completed – requisitions also need to be set to the correct Kanban status. To make this easier for users, this process is automatic. If a user marks a requisition as 'complete', the Kanban status is automatically updated. Similarly, if the user un-completes a requisition, the Kanban status is also adjusted.

However, for those who wish to use the Kanban system in a more sophisticated manner, it is possible to manually update the Kanban status from within MyCalendar.

For instance, you may have a workflow process that requires all work completed to go through a QA stage. If this were the case, a Kanban stage called 'QA' might be added to the workflow. On finishing their work, users would then set the Kanban stage of the requisition to 'QA' rather than simply completing the requisition.



User access rights - MyCalendar

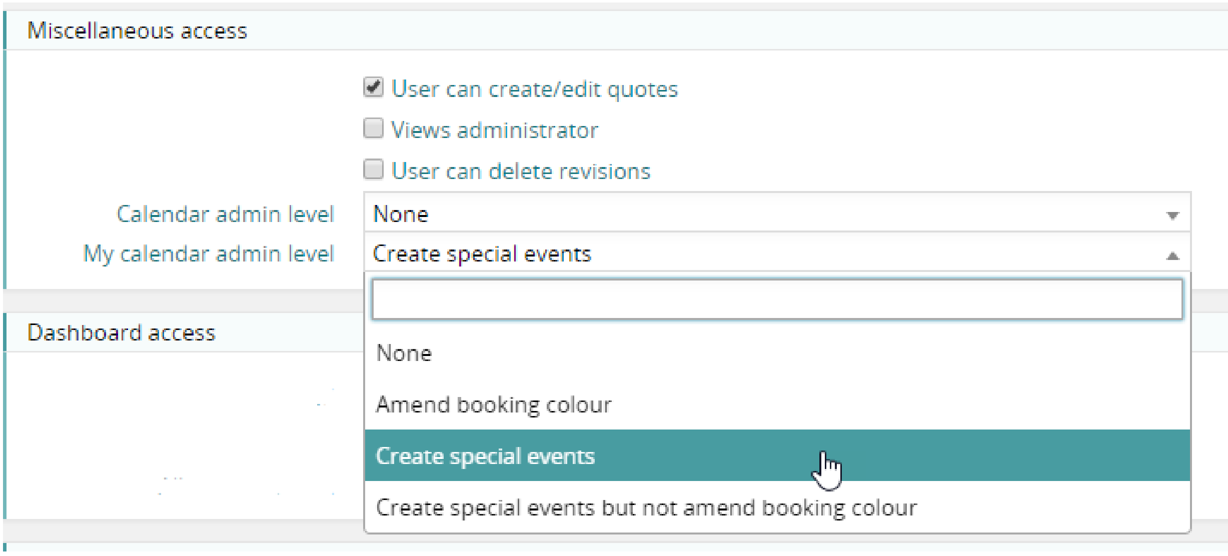
Under 'Access', 'Miscellaneous access' there is a section labelled 'My calendar admin level' The option selected defines what the user can do in MyCalendar. This includes allowing access to the new 'Add event' feature described above.

- None (default)
    - Users can view bookings, add calendar booking description & notes, and set the feedback flags

- Amend booking colour
    - As above, but users can also set the colour of a booking (which changes the booking colour in the main calendar booking screen.

- Create special events
    - Users can add holidays and some other events into MyCalendar (which will also appear in the main calendar as tentative bookings).

- Create special events and amend booking colour
    - As above, but users can also change booking colours.



Booking descriptions

Bookings display, by default, the client name, job number & hours booked. Previously this only showed the client name.

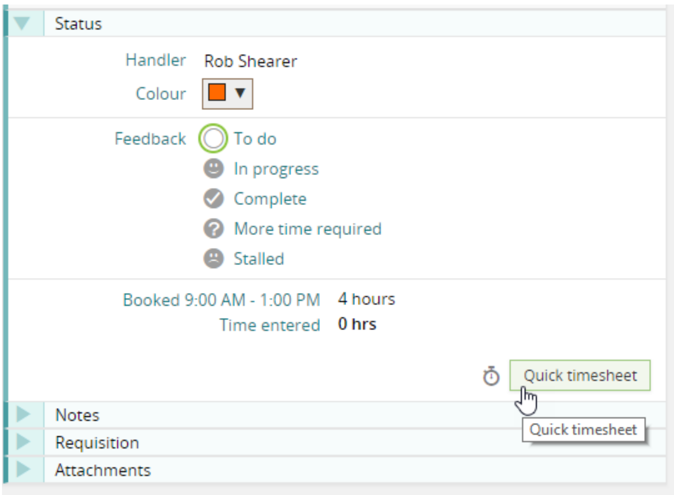
Note: The booking description can be changed to a different build – but only if the user has access to Calendar bookings. In a future release, this feature will be available to MyCalendar users.

Quick timesheet

The 'Quick timesheet' feature of MyCalendar enables several actions with a single click.

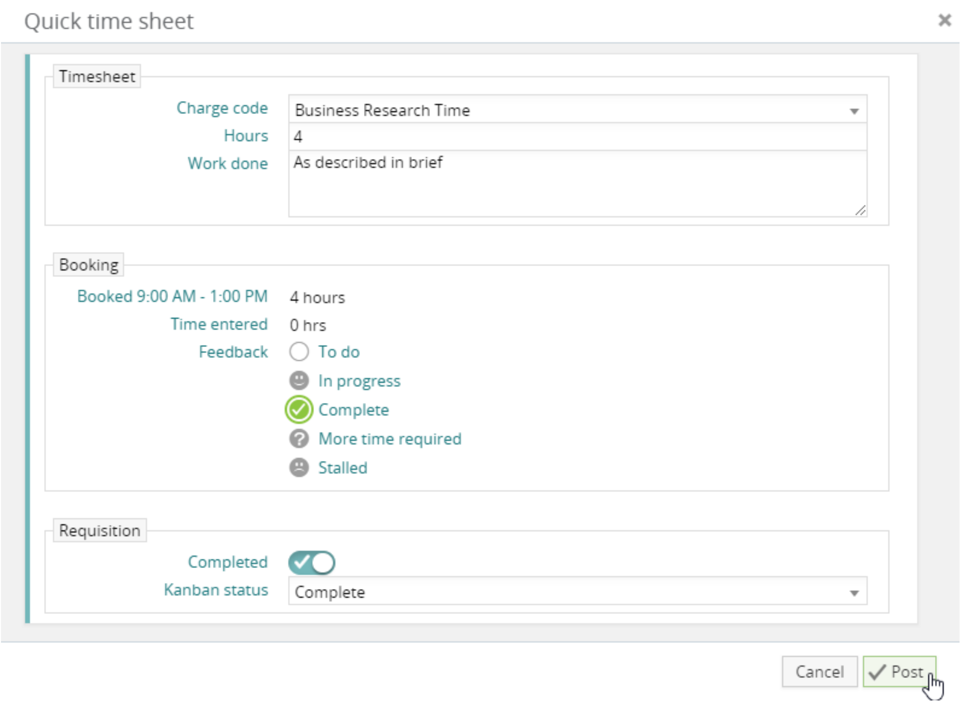
Previously users were required to mark bookings as either complete or stalled. They would then update the status of the related requisition, and then post a timesheet. The new Quick timesheet functionality makes this process much easier.

Quick timesheet button



Features

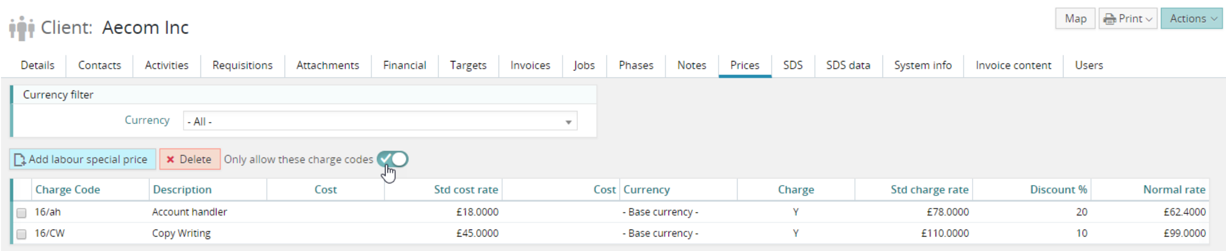
- The user creates a timesheet for the remaining hours of the booking. **Note**: timesheets created this way are automatically submitted/posted.
- The feedback status can be set to complete / stalled etc.
- If this booking came via a requisition, the user can mark the requisition as completed. The Kanban stage is automatically adjusted or set by the user.



Client prices

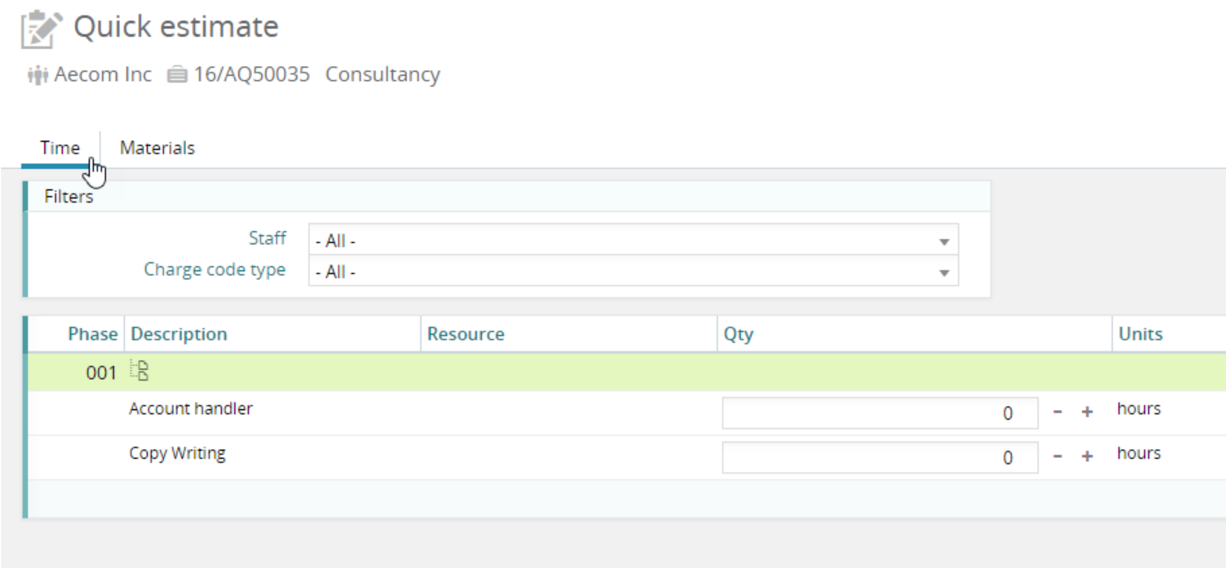
This is an optional feature to force all jobs for a client to exclusively use client prices. Previously, charge rates could be overridden but not excluded.

In this example, this client has just two specific client prices. The user has chosen the option 'Only allow these charge codes'.



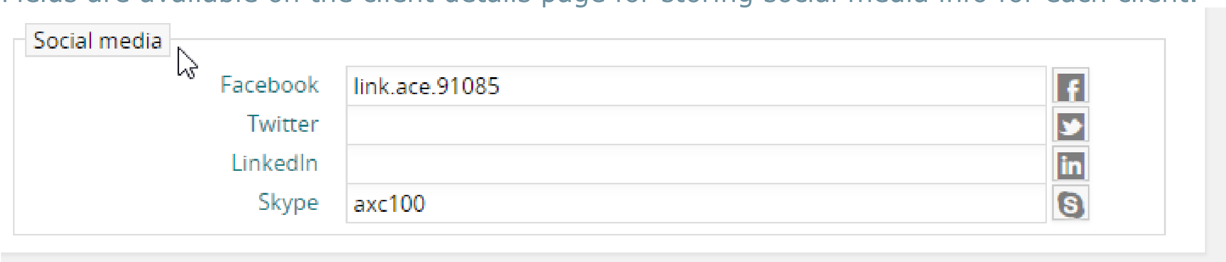
Quick estimate for this client

When creating an estimate for this client, only the special charge codes can be selected.



Social media

Fields are available on the client details page for storing social media info for each client.



Leads

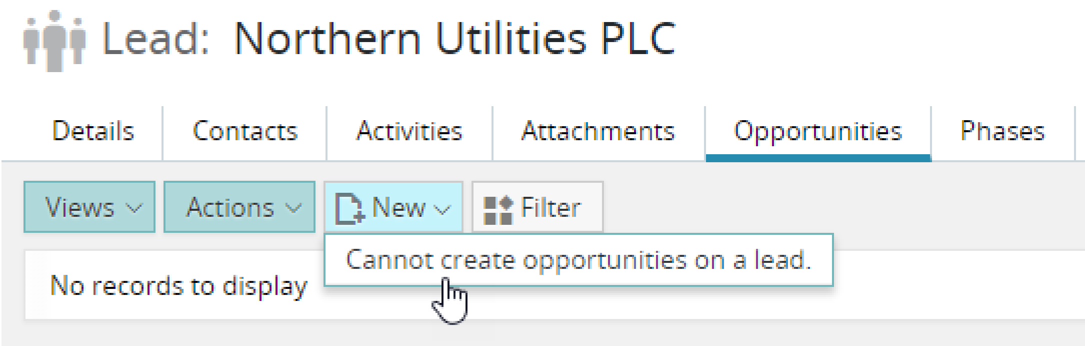
Leads are now supported in the Synergist Web/Cloud UI.

Note: Users who are changing from the desktop UI of Synergist will notice some differences in the interface with the Web/Cloud UI. In the Web/Cloud UI, leads are organization-based and do not require a contact record.

Definition:

A client (Organization) record can be set to one of three main statuses:

- **Lead**
  A lead is a potential client. At this status, no final vetting has been completed, so no opportunities are allowed to be created for this organization until it has been promoted to a Prospect. However, 'Activities' can be created for Leads.

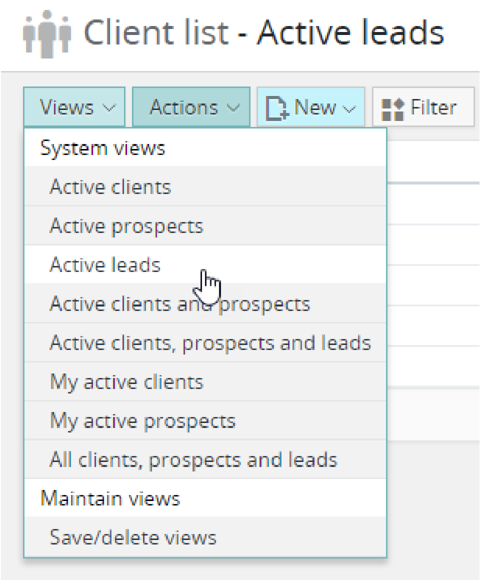


- **Prospect**
  Similar to a Lead but the organization has been qualified and it is therefore possible to create opportunities ('Quote' status jobs) and quote documents. It may be possible to even post costs to an opportunity – this is dependent on company settings.

- **Client**
  - Once promoted to a Client, live jobs can be created for this organization.

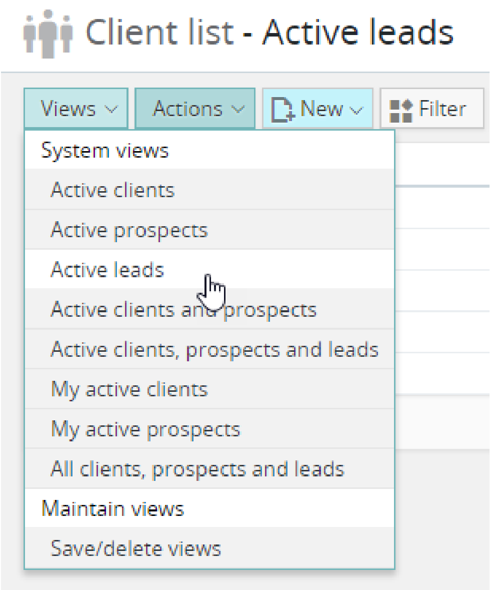
New view – active leads

An additional standard view has been added to the client list - 'Active Leads'



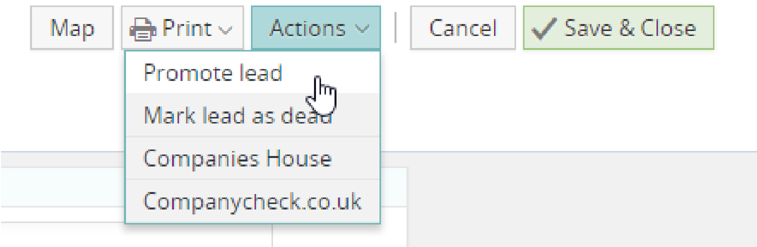
Creating a lead

You can now create a 'Lead' from the main client lists. You can also add one or more contacts to a Lead – similar to the features available for 'Prospects'.

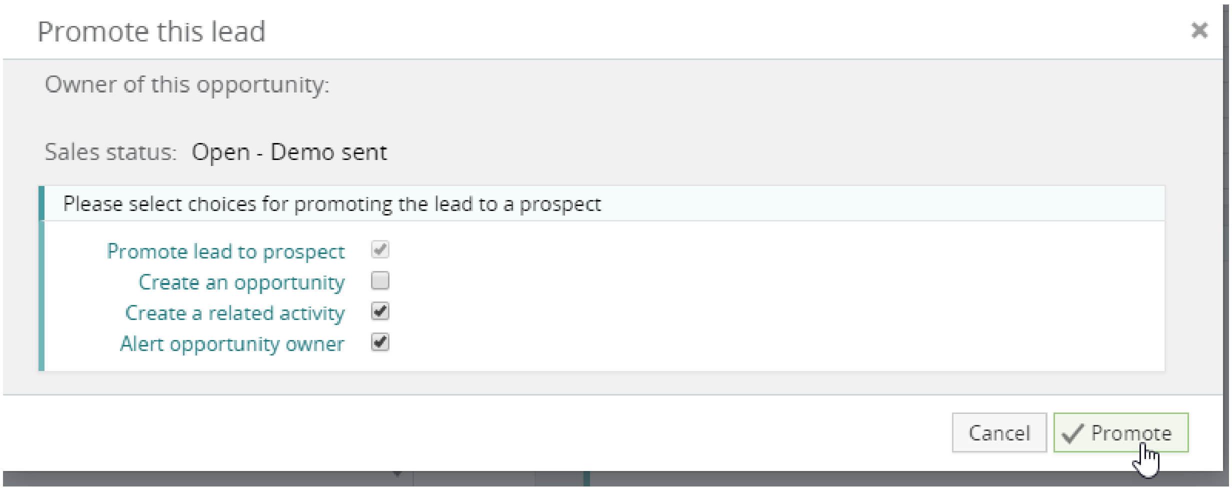


Promoting a lead

You can promote a Lead to a Prospect using the actions button on the organization record.

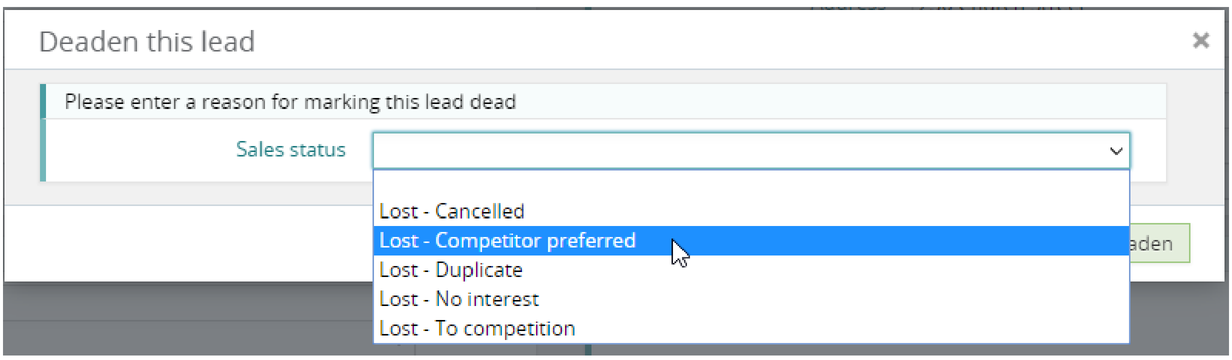


You will then see a dialog where you can specify whether you wish for an automatic activity and opportunity record to be created.



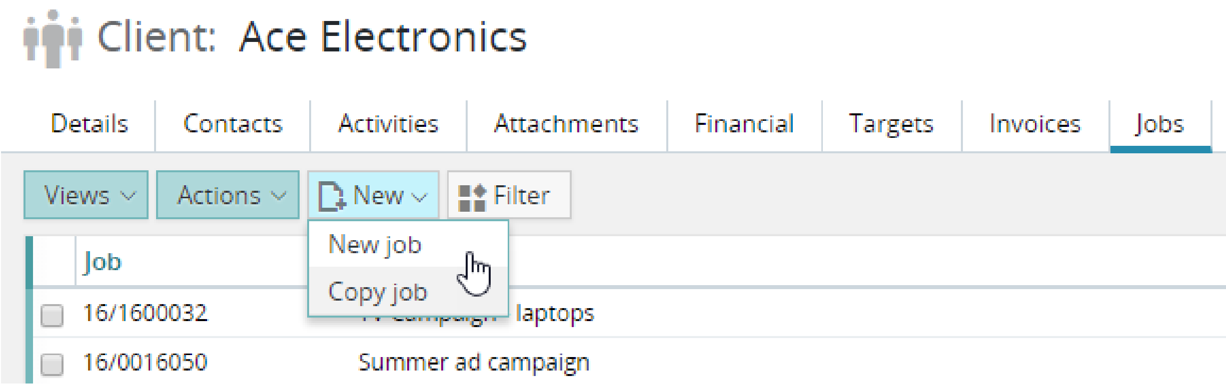
Deadening a Lead

You can also deaden a lead and, if required, resurrect a deadened lead. When doing this process you have the opportunity to select a sales status.



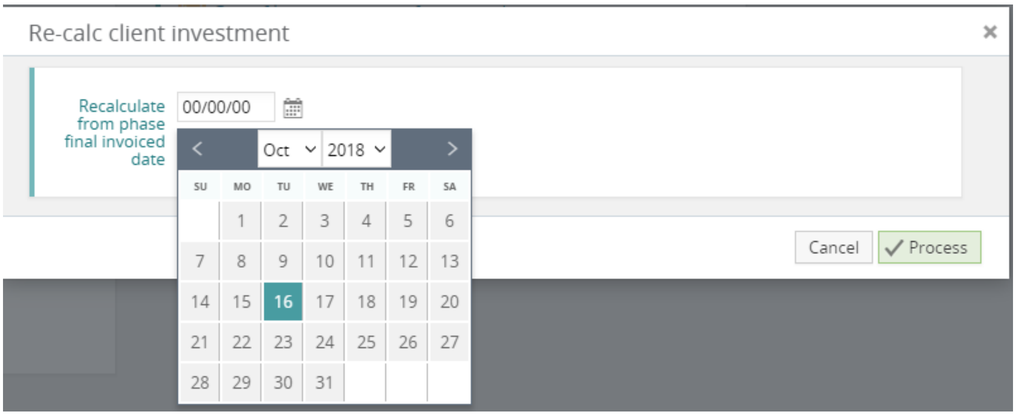
Creating a job from client record

This is now an available option. You can also copy a job from the client record jobs list.



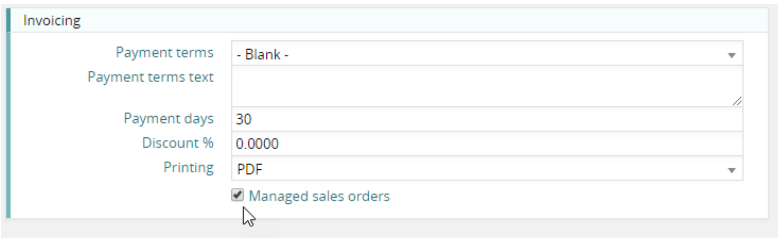
Recalculating client investment

This is available via the 'utilities' pre-process section.



Managed sales orders

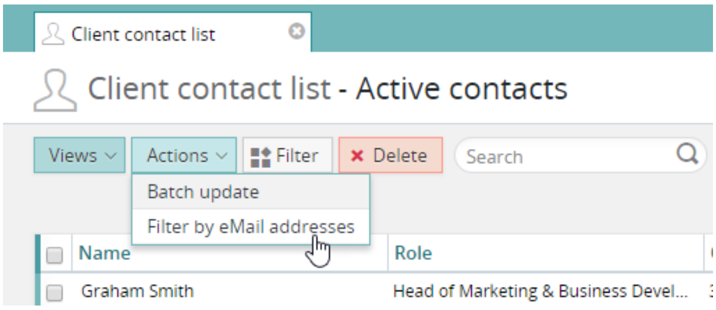
This is a feature not previously available in the Web/Cloud UI. If it is available in your system, the feature can be activated for a client, in the financial tab of the client record.



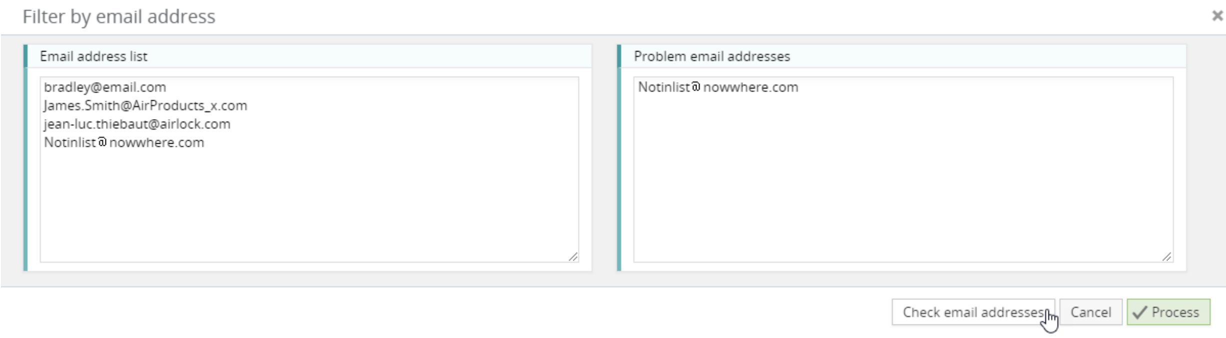
Once activated for a client, any jobs for the client will have an additional tab 'Client SOs' (Client sales orders), as will the client record.

With this feature, it is possible to allocate a single 'Client sales order' across multiple jobs and invoices. It is also possible to allocate multiple Sales orders to a single job.

Filter by email addresses

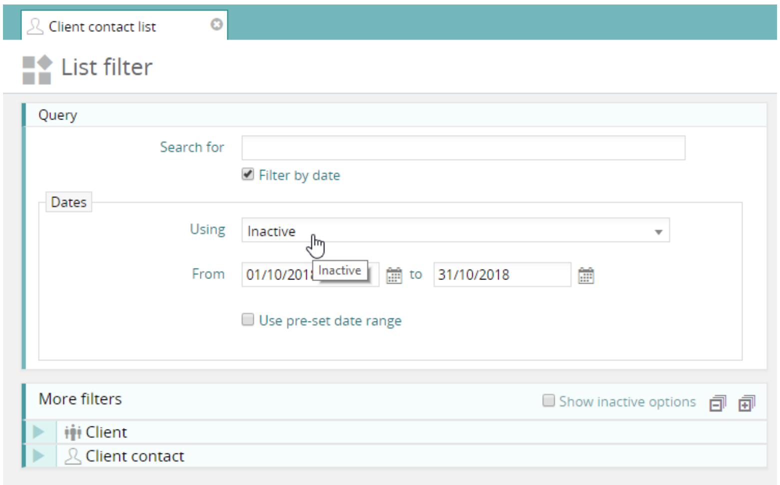


This useful feature has been enhanced. We now have a 'Check email addresses' button. On clicking, the system will list any missing email addresses in the right hand window.



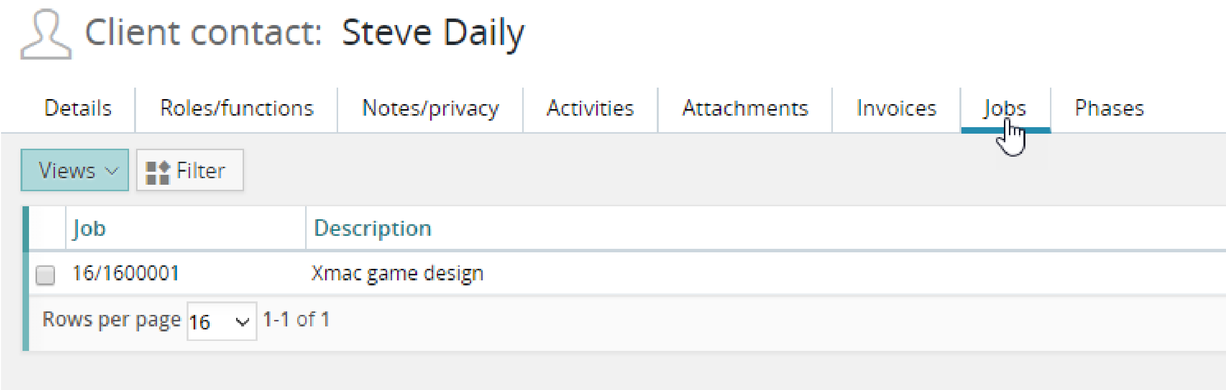
Inactive date filter

To help manage GDPR issues it is now possible to filter the client contacts list by 'Inactive date'. Typically, this feature is used to identify contacts that have been set inactive and have remained so for a certain period. At that point, personal details could be cleared down (e.g. social media account names, cell phone numbers etc.).



Client contact - job & phases tabs

Job and phase tabs have been added to client contacts.



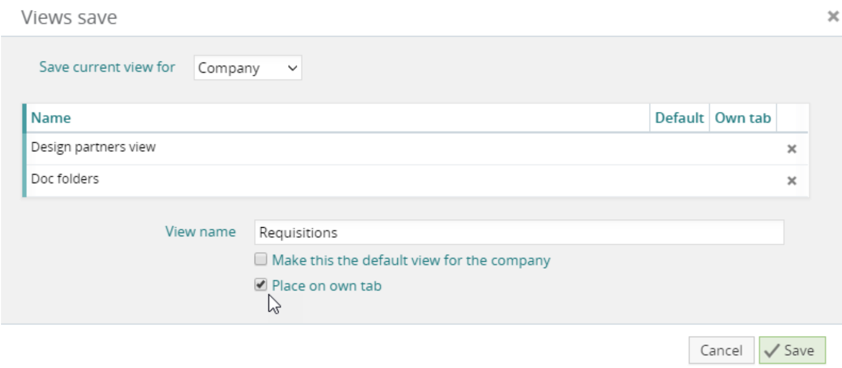
Criteria & views

Saving a view – creating a tab

You will find a new option in the 'Save view' dialog. If you check the check-box 'Place on own tab' the view you are saving will not only appear as a new view, it will also create a **new tab** on the following data input forms:

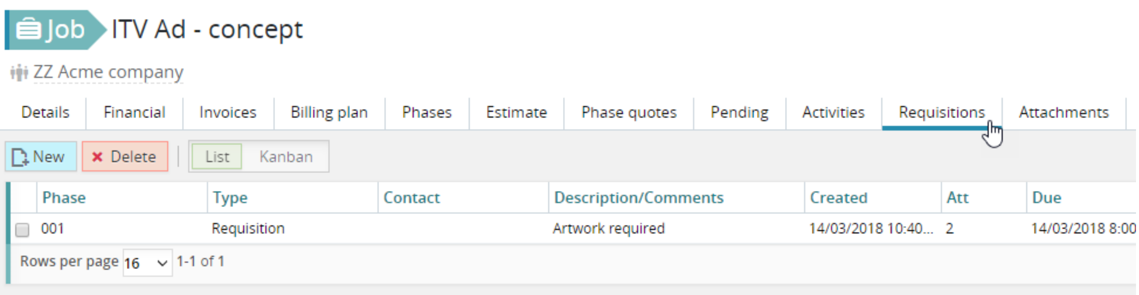
- Client
- Job
- Phase
- Supplier

Save view dialog

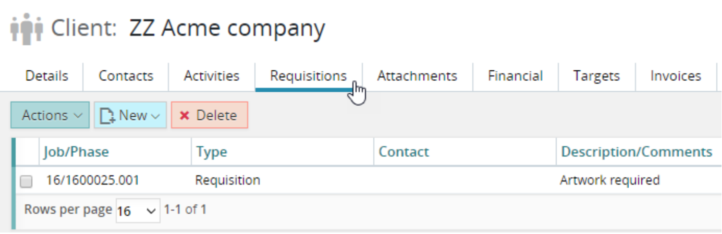


New tab appears

The 'Requisitions' view now appears as a tab on the job card.



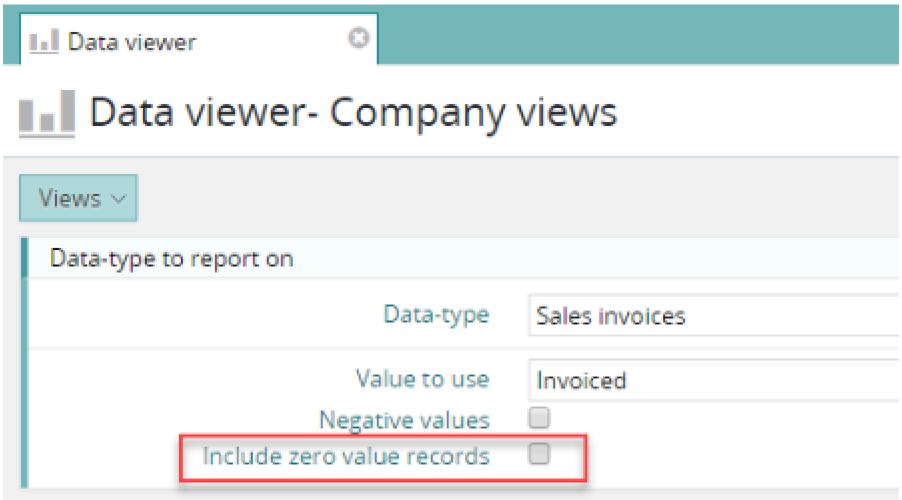
Notice that it has also appeared on the client card.



Data viewer

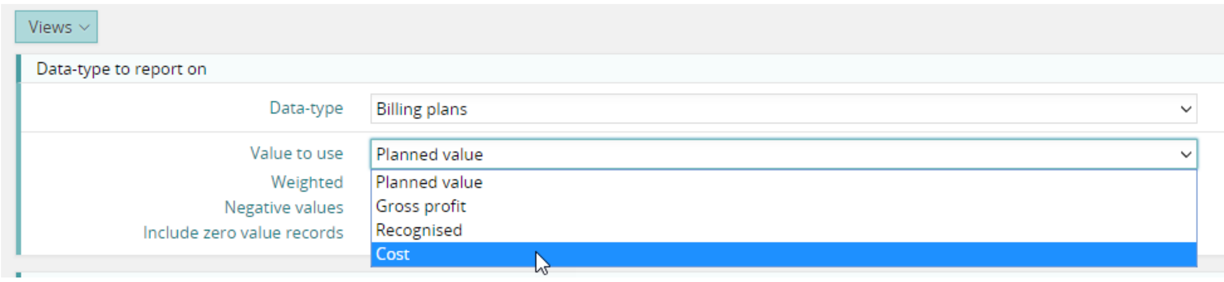
Include zero value records

By default, the Data Viewer only ever returns data that is present and does not accumulate values that are zero, to avoid getting surplus summarised rows. In some cases where the user wishes to summarize at a high level, there may be a use for zero values. This feature has been added to the Data viewer.



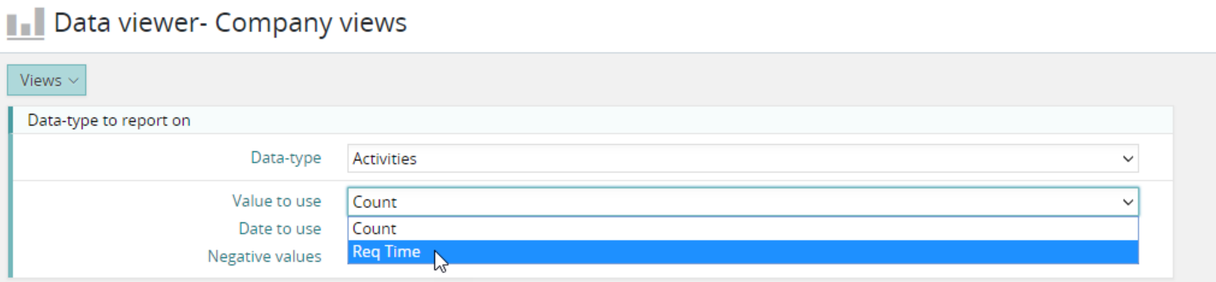
Reporting on billing plans

For billing plans, there is a new option for value choice - Cost.



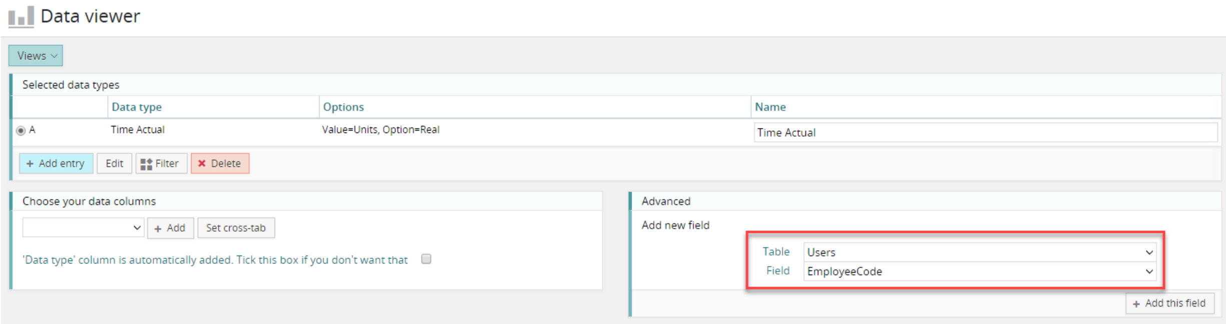
Requisitions

If reporting on requisitions – the hours requested can be output in the data viewer.



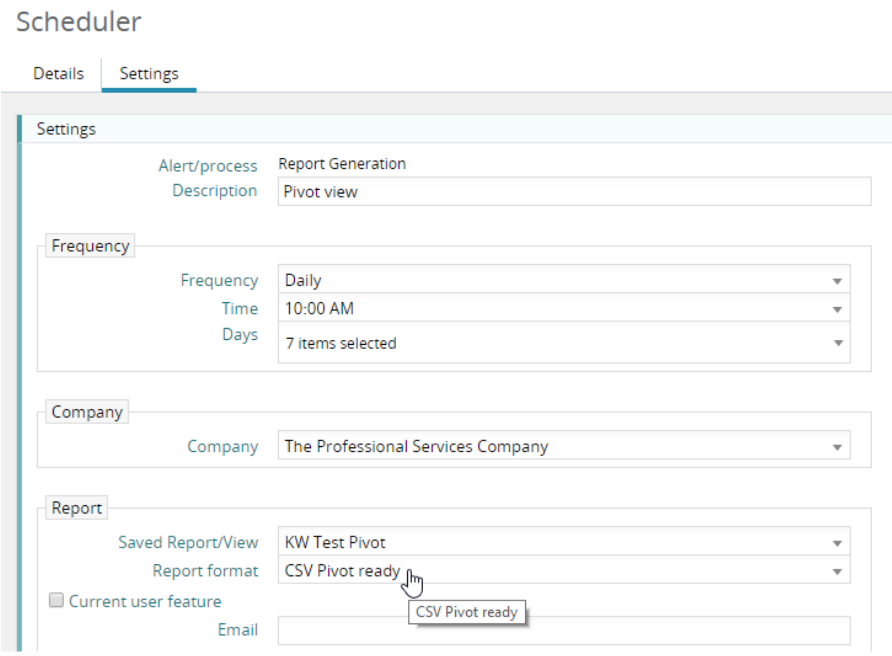
Fields from more tables available to add

You can now add fields from the Project, Sub-Project/Campaign, Staff Resource and User tables. The tables available will depend on which data type(s) you are including in your query.



Pivot-ready output for Data Viewer scheduled events

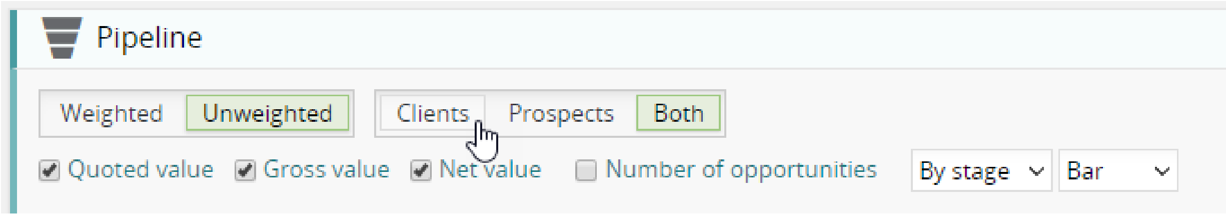
Added as an option to the scheduler to specify CSV Pivot-ready output.



Dashboards

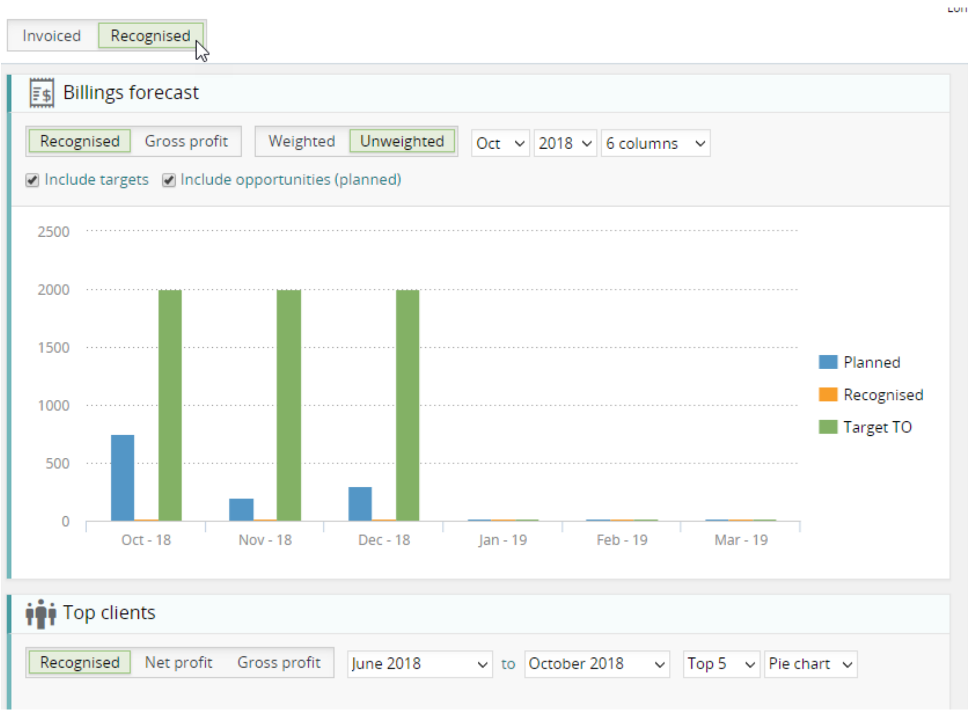
Pipeline

The Pipeline can now be filtered by clients / prospects.



Revenue recognition

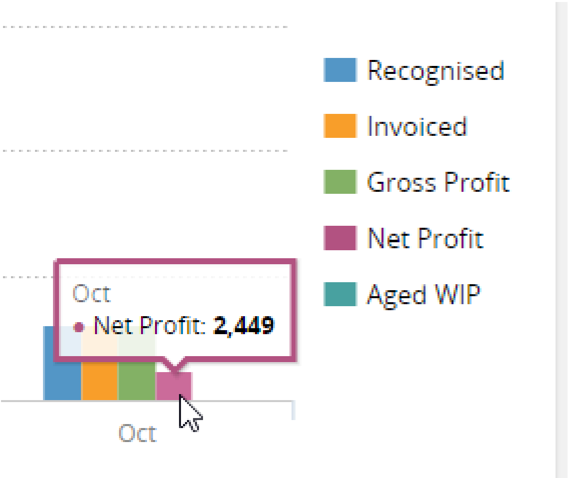
For clients using revenue management, the dashboards can now show both invoiced and recognised financial data.



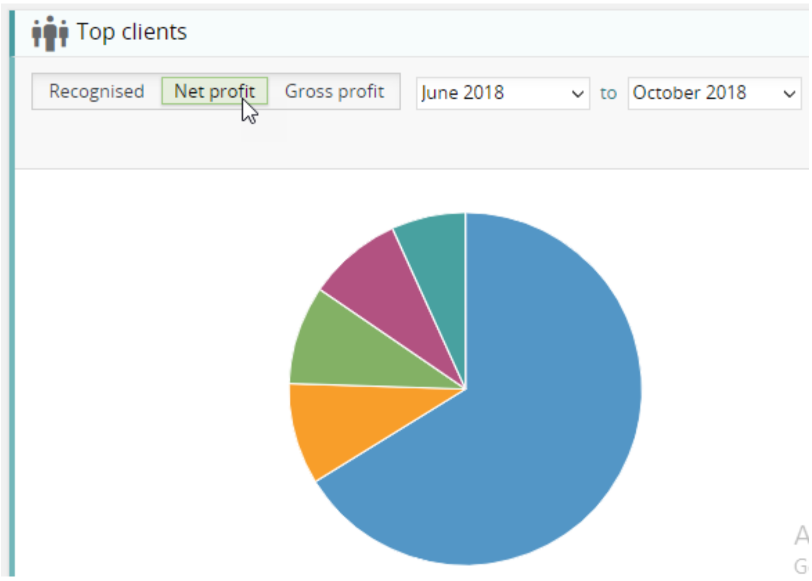
Net profit

Net profit is now supported in the dashboards.

Financial summary



Top clients



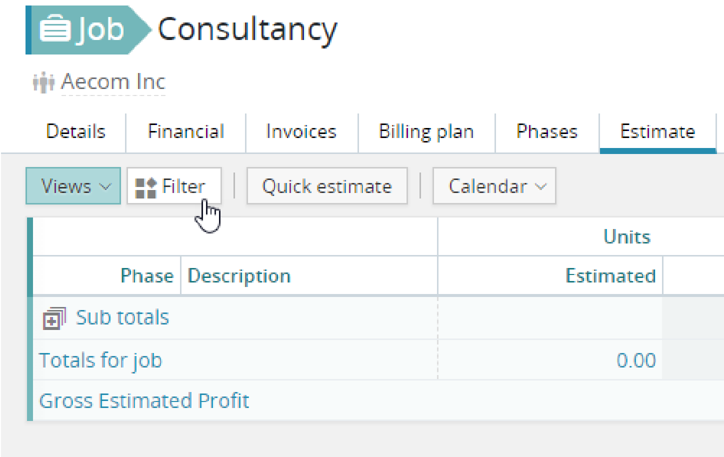
Saving dashboard views

If a user selects/unselects checkboxes, or sets the button states to provide a required view, the next time the user logs in he/she will see the same dashboard views. One exception to this is the date selections. Dates always return to the default state since they are designed to follow the current week/month.

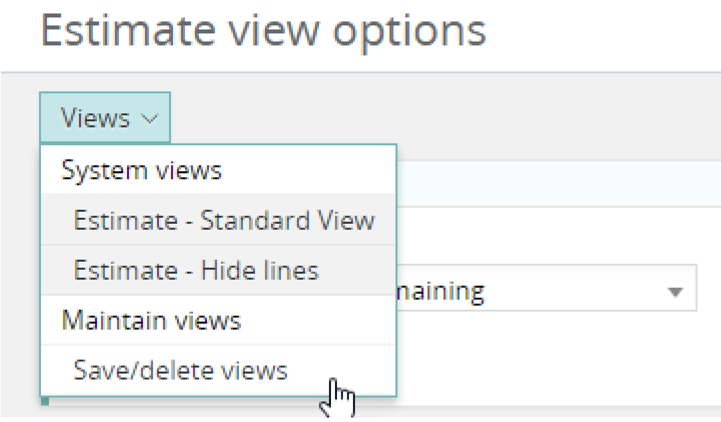
Estimating

Creating estimate views

You can save estimate filter settings as a view. Click on the filter button, and select the settings you require.

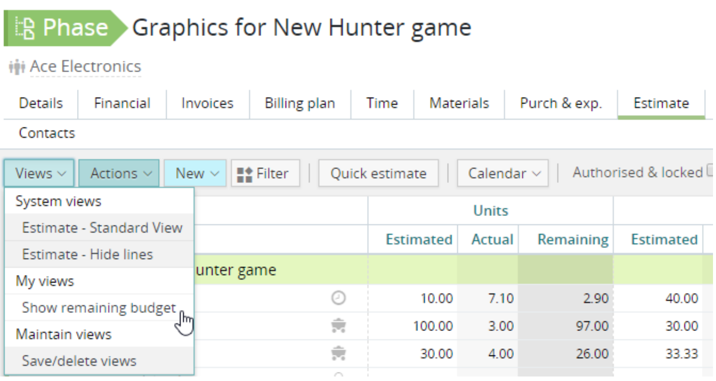


You can then save the settings as a view. If you are a views administrator you can create a company view (for all users to share), otherwise create a personal view for yourself.



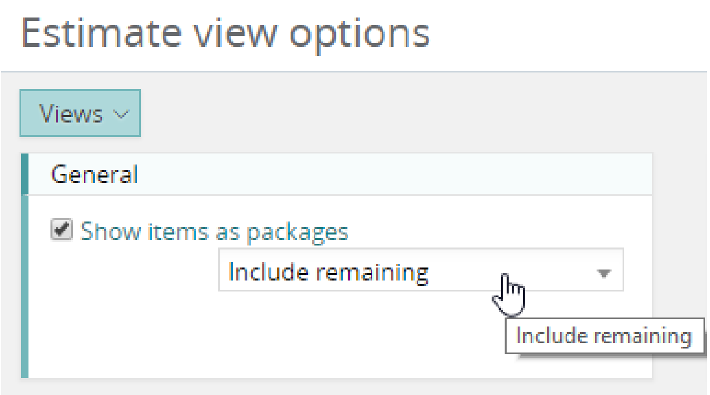
Selecting a view

To select a saved view, simply click the 'Views' button



Option to show remaining budget

This feature is switched on by selecting 'Include remaining' in the filter.
You should save a view with this setting to make it easier to select this view of the estimate (see above).



The estimate screen

Now it is possible to see the remaining budget (estimated less actuals). Notice there is also a new summary area at the bottom of the screen. From here, you can see the total remaining budget for this job/phase broken down by time, materials & purchases.

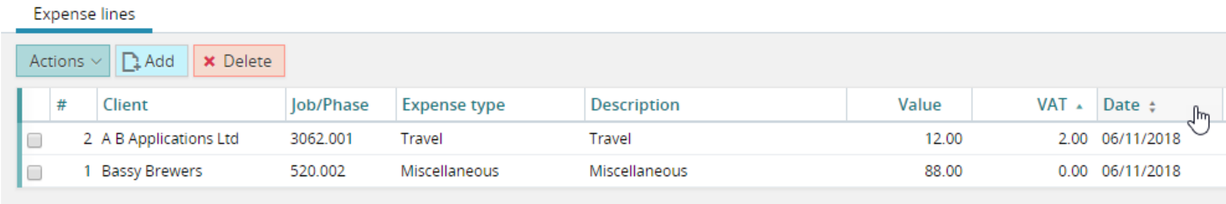
Packages

For systems that are already using 'packages' (bill of materials), this feature is now available in the browser-based product. **Note**: This feature is not available in the cloud product.

Expenses

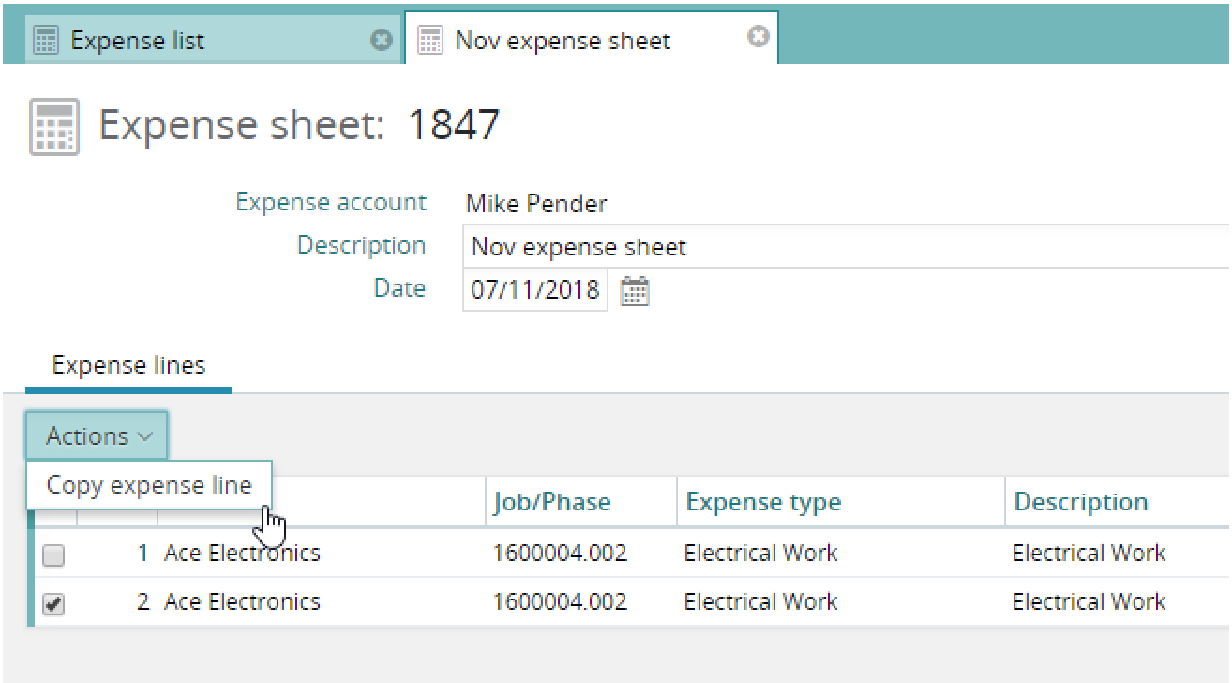
Expense lines – sorting

Expense lines can now be sorted by column heading.



Copy an expense line

The user is able to select one or more lines from an existing sheet and copy (duplicate) the line(s).



If the source sheet is a submitted sheet, the copied line is added to an existing un-submitted sheet. If no un-submitted sheet exists, a new sheet is created.

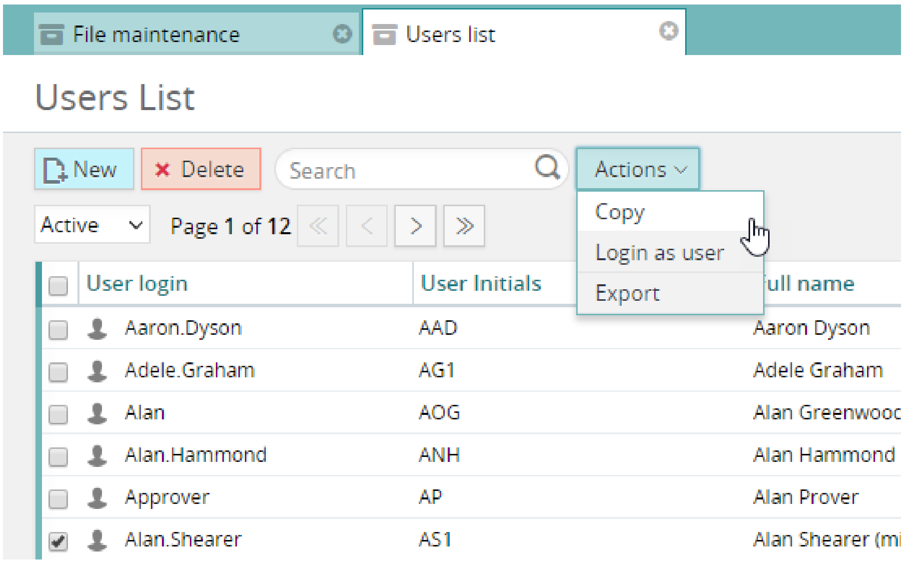
If the source sheet is un-submitted – the line will be duplicate to the same un-submitted sheet.

User table

Copy user

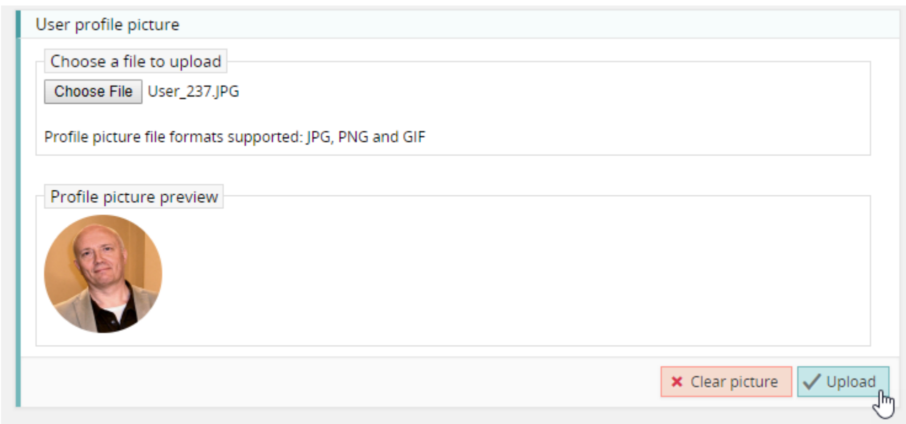
The copy user feature will copy key settings from the source user:

- Approval settings
- Permissions
- Access rights
- Licensing groups / modules
- Company access and teams



Add avatar

The administrator can now add an avatar on behalf of a user from the details tab of the user record.

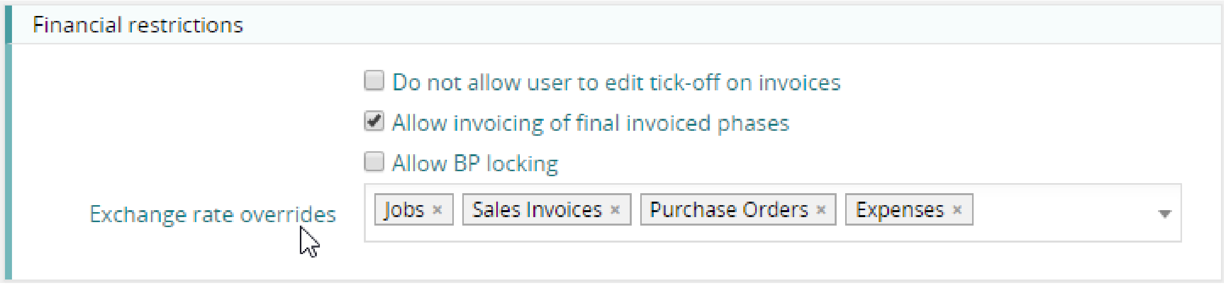


Control of currency exchange rate override

This is a user setting to allow control as to whether a user is able to change a currency exchange rate.

The setting affects the following:

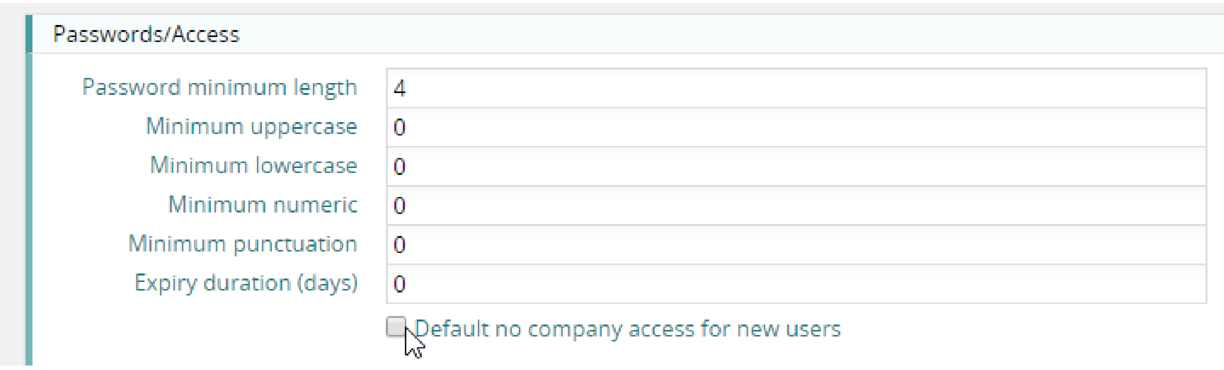
- Jobs (including Opportunities)
- Sales Invoices/Credits
- Purchase Orders
- Direct Expenses
- Expense lines



New system setting to define default access for new users

Previously, when a new user was created, the new user was always given access to all current companies by default. A new system setting has been provided to override this default behavior.

Setting appears under 'System parameters'



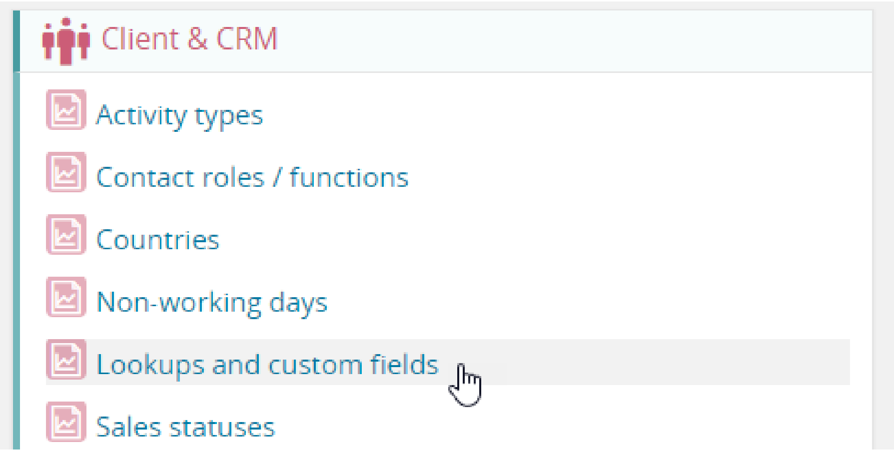
Invoicing

Custom fields

The use of custom fields is now supported for sales invoices.

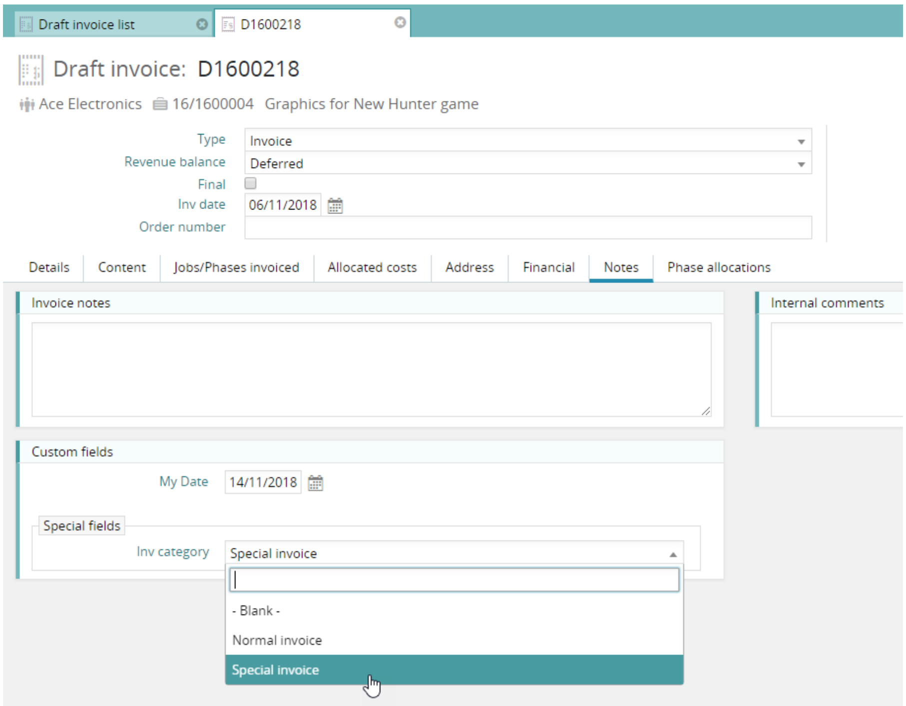
FM

To set up custom fields for invoices you will need access rights to the File Maintenance section of the product



Notes tab

Custom fields appear on the Notes tab of each draft/real invoice.

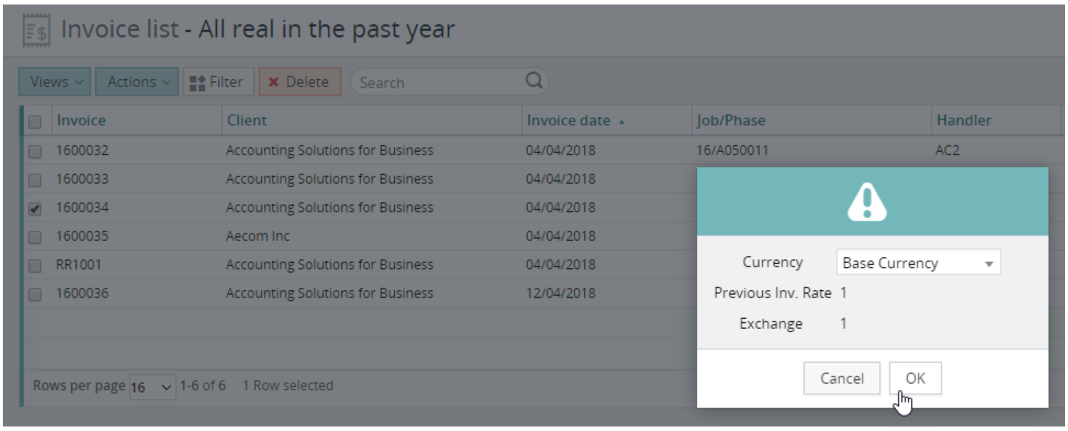


Searching

You are able to filter the invoice lists based on custom fields.

Repeat invoice

The user is offered a dialog on repeating an invoice to establish the currency and exchange rate to use for the new invoice.

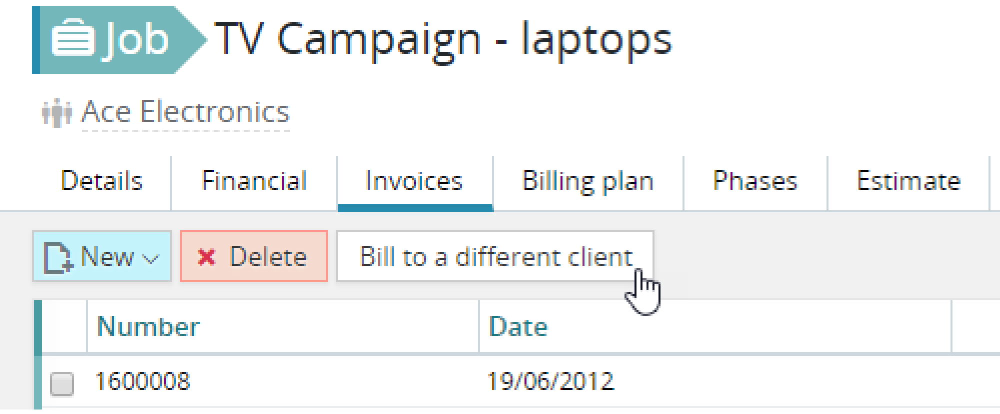


Bill-to-client

This feature enables the user to invoice a client other than the client that the job belongs to.

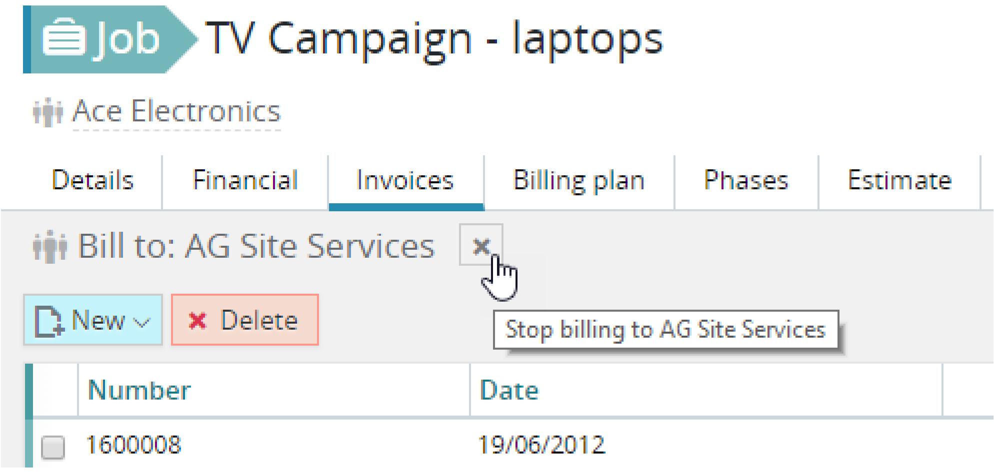
The user can specify the client that future invoices should be billed to by default. This is set up on the Invoices tab of a job.

Invoices tab of job



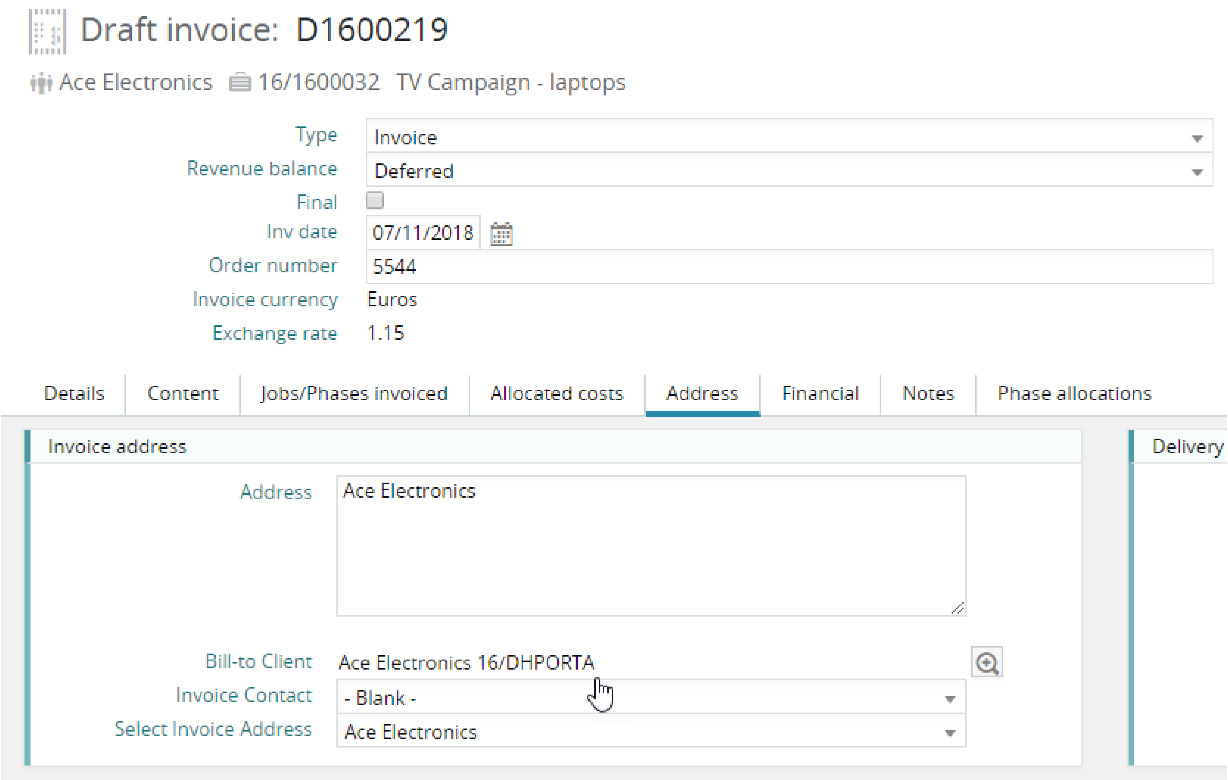
Bill to a different client selected

In this example, all invoices for this job are to be raised against 'AG Site Services'.



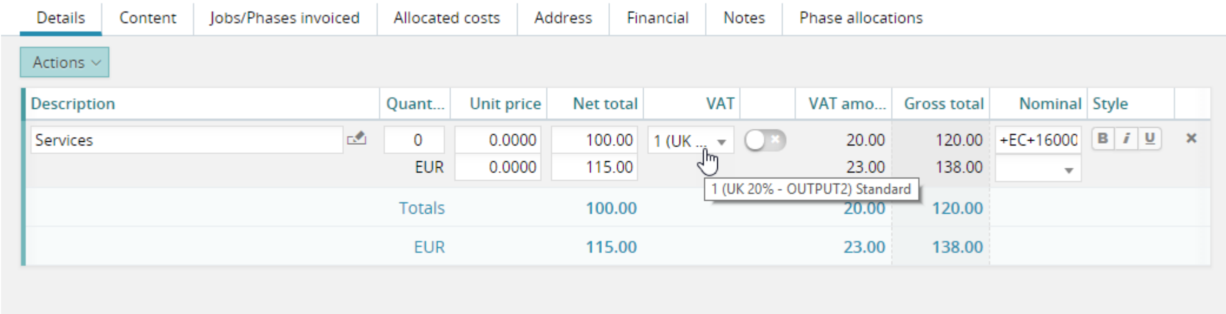
Address tab of the invoice

The 'bill-to' client is displayed on the Address tab of each invoice. If this invoice is still in draft form, this can be changed to a different client as required.

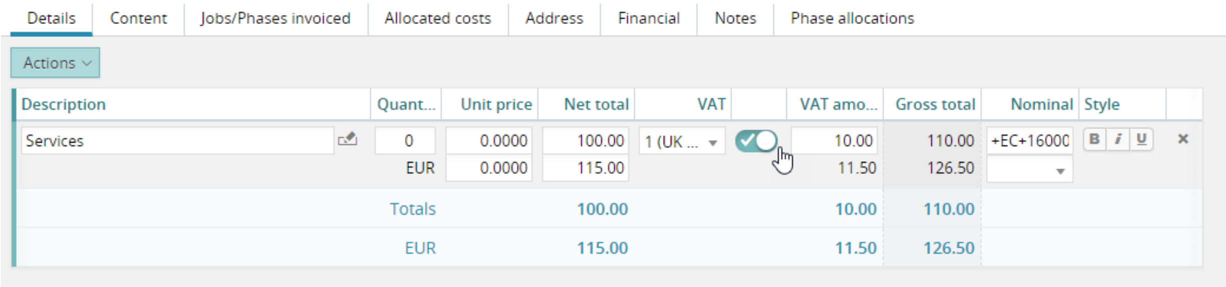


Overriding the default VAT value

In this example, the VAT has defaulted to code 1 - 20%. While this invoice line is in this state, any changes to the Net total will automatically calculate the VAT at 20%.



The user has now toggled the override switch and changed the VAT value. It is now no longer synched to be 20% of the Net total.

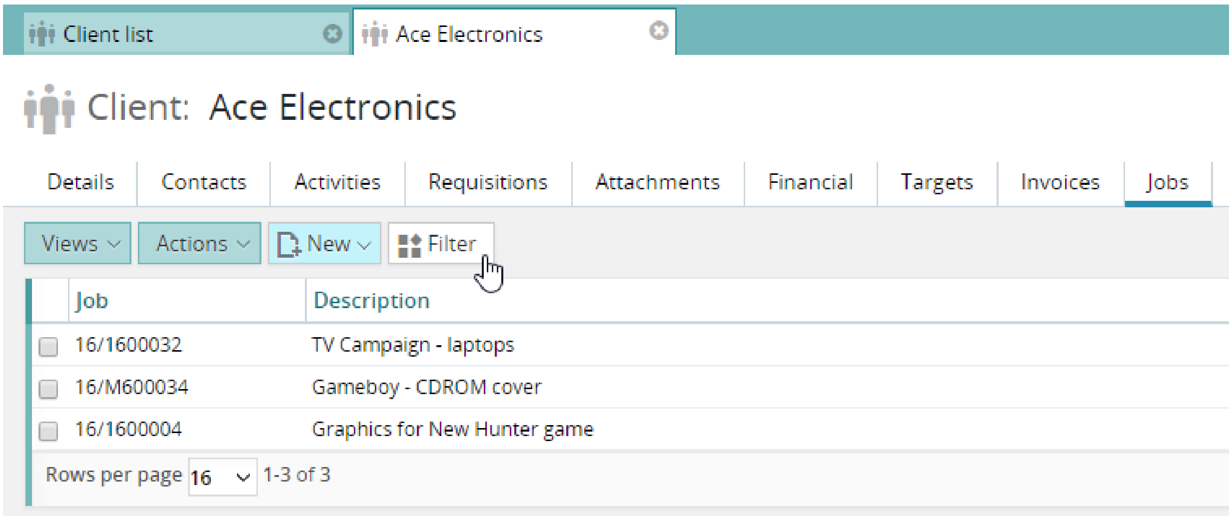


Multi-job invoices

A general enhancement to the client card: filter. This new feature will help users who invoice multiple jobs on the same invoice.

Filter button

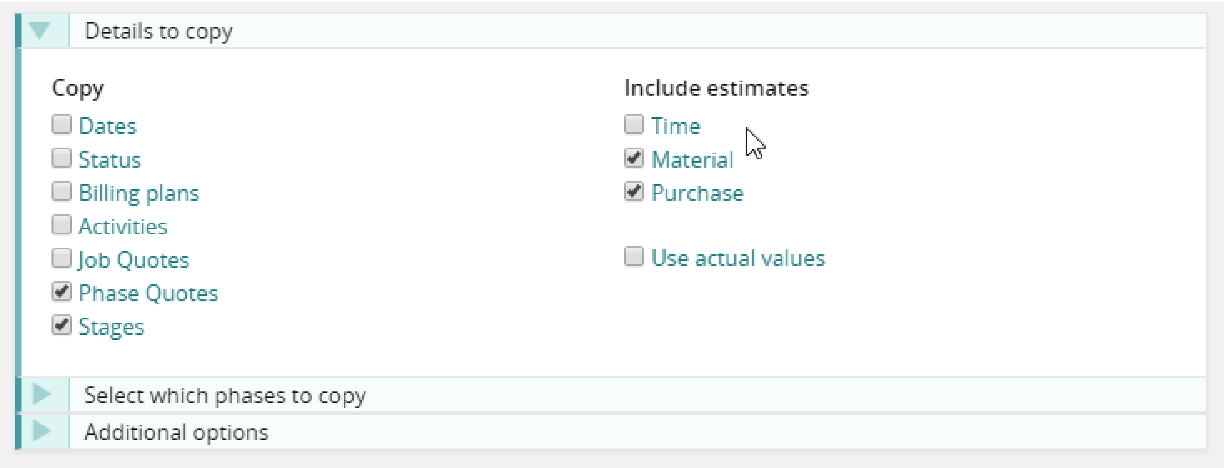
By clicking this button, the user can filter the list of jobs/phases. For example, he/she may wish to filter the list of jobs displayed so that only un-invoiced jobs for a specific project are included. It is then easy to select the required jobs for a multi-job invoice.



Jobs & phase

Job create – views

When creating a job it is possible to copy an existing job, or create a job based on a job template. In both cases, it is necessary for the user to decide exactly what will be transferred across from the source job to the target (new) job. The right hand panel in the job creation dialog controls this feature.



Options views

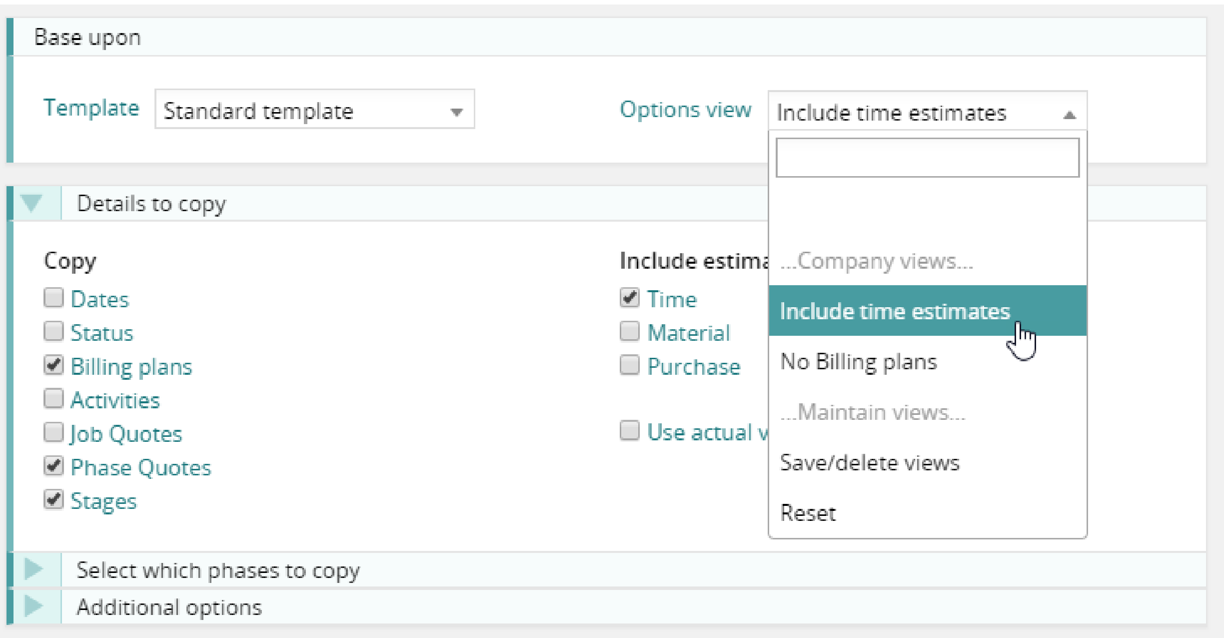
Previously, it was the user's responsibility to make these choices – or just accept the default values suggested by the system. We now provide a feature for saving these settings. In this way, users can either have a different default set up – or actively select from a pre-created set of options.

Creating an 'options view'

Views administrators can create these options views, which then become available to all users. In addition, non views-administrators can create views for their own use.

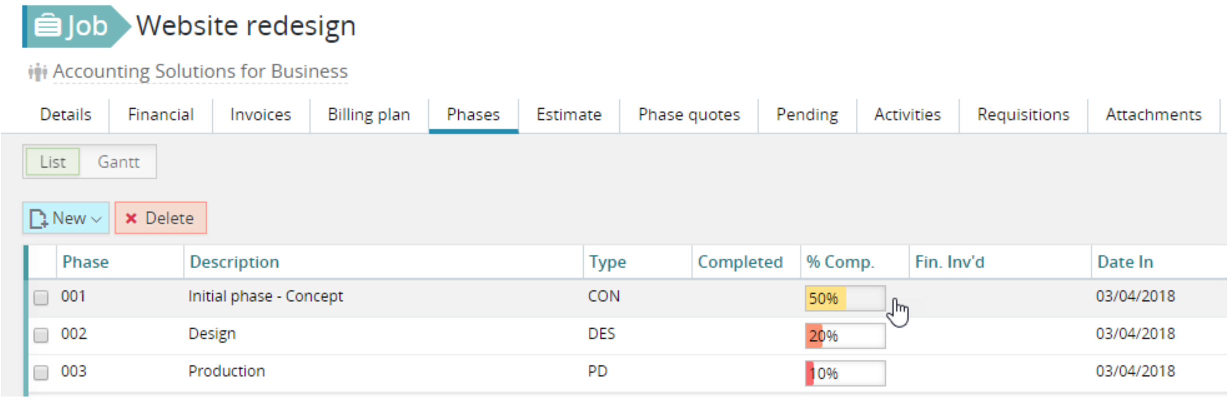
Selecting an 'options view'

In this example, the system has two pre-defined settings available to the user.



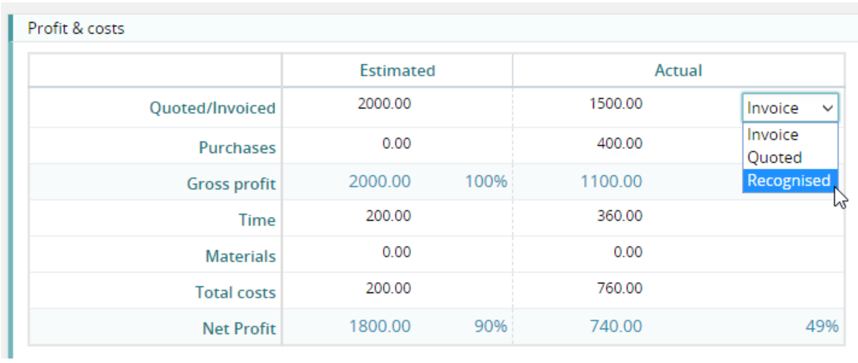
Thermometers on job phases tab

The 'percentage complete' displays as a thermometer.



Financial page – recognised

For systems set to use the revenue management feature, the financial page of jobs and phases can be set to display either recognised values or invoiced values.



Charts

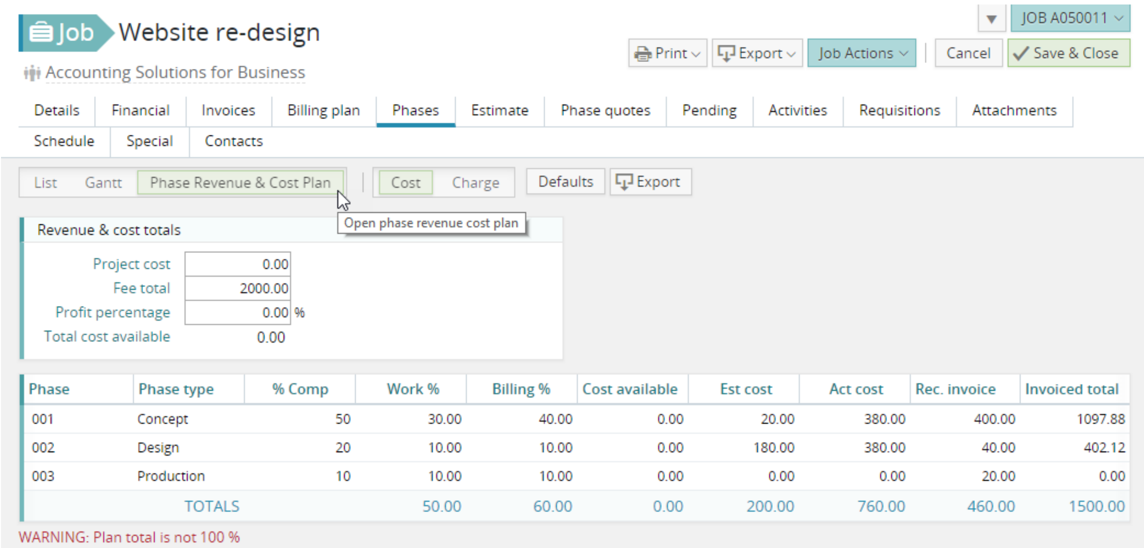
There is an option to display the recognized figure in chart form.

Note: The selected chart is automatically saved back to user settings – therefore users will always see their favourite charts when accessing jobs and phases.

Special feature for Architects

Revenue & cost plan

Note: This feature is only available for specifically-configured systems.



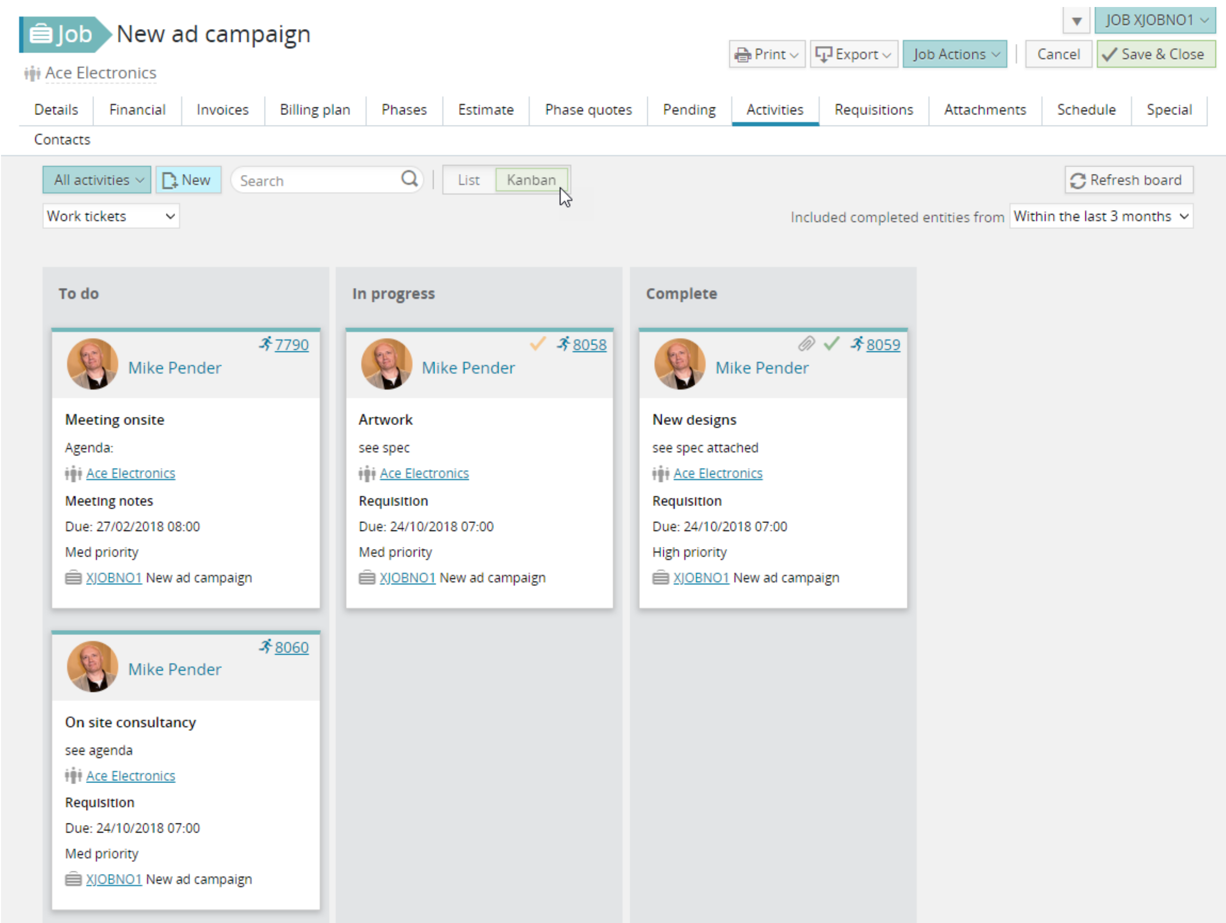
Kanban boards

A **Kanban board** is a workflow visualization tool that enables you to monitor the flow of work. In Synergist, a Kanban board is represented by a number of columns – each one a Kanban status.

In this example, we have just three columns 'To do', 'In progress' & 'Complete'.

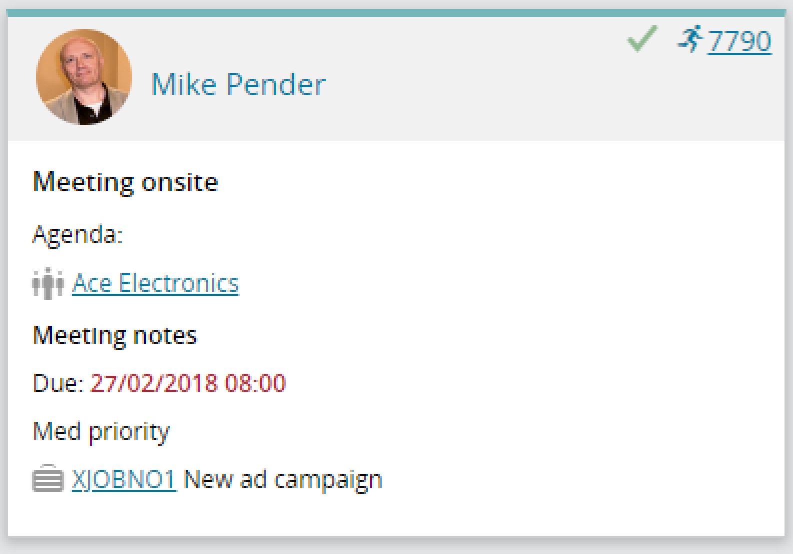
Each column has a number of cards, and each card represents a Synergist 'Activity' record. The user can drag an activity from one Kanban status to another.

Notice there are two display options available - the normal list view and the new 'Kanban' board. In both cases, you will see the same activities. You can switch from one display to the other using the buttons provided.



Kanban cards

Each card displays key information from the activity record:



Header area

At the top of the card, it displays an avatar of the owner of the activity. It then provides some status icons.

- Number of attachments
- Status
  - Whether the activity is complete (a green tick), and in the case of requisitions an amber tick if the requisition is not complete but has been actioned.
- Link to open the activity

Main body

Under the heading area is other key information:

- The subject (short description) of the activity
- The activity details
- Client name (clickable)
- Type of activity
- Date & time due (this is red if overdue)
- Priority setting
- Job number and description (clickable)

Using the Kanban board

Activity Kanban boards are available in several areas of the product.

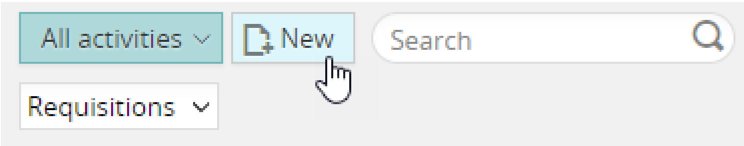
- Main activity list
- Job activity tab
- Opportunities activity tab

If you create an activity view and specify that it should appear in a separate tab (on clients, jobs etc.) the Kanban board view will also appear there.

From the Kanban interface, you can do the following actions:

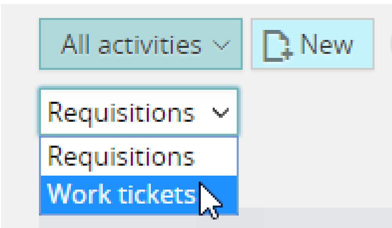
- Select a view
  - These are the same views you would have already set up for your activity lists.

- Create a new activity (card)
  - This will create a new activity, in the normal way, in a separate tab. The activity will default to a 'To do' (see below – building Kanban boards).



- Filter the items in the list using the search bar

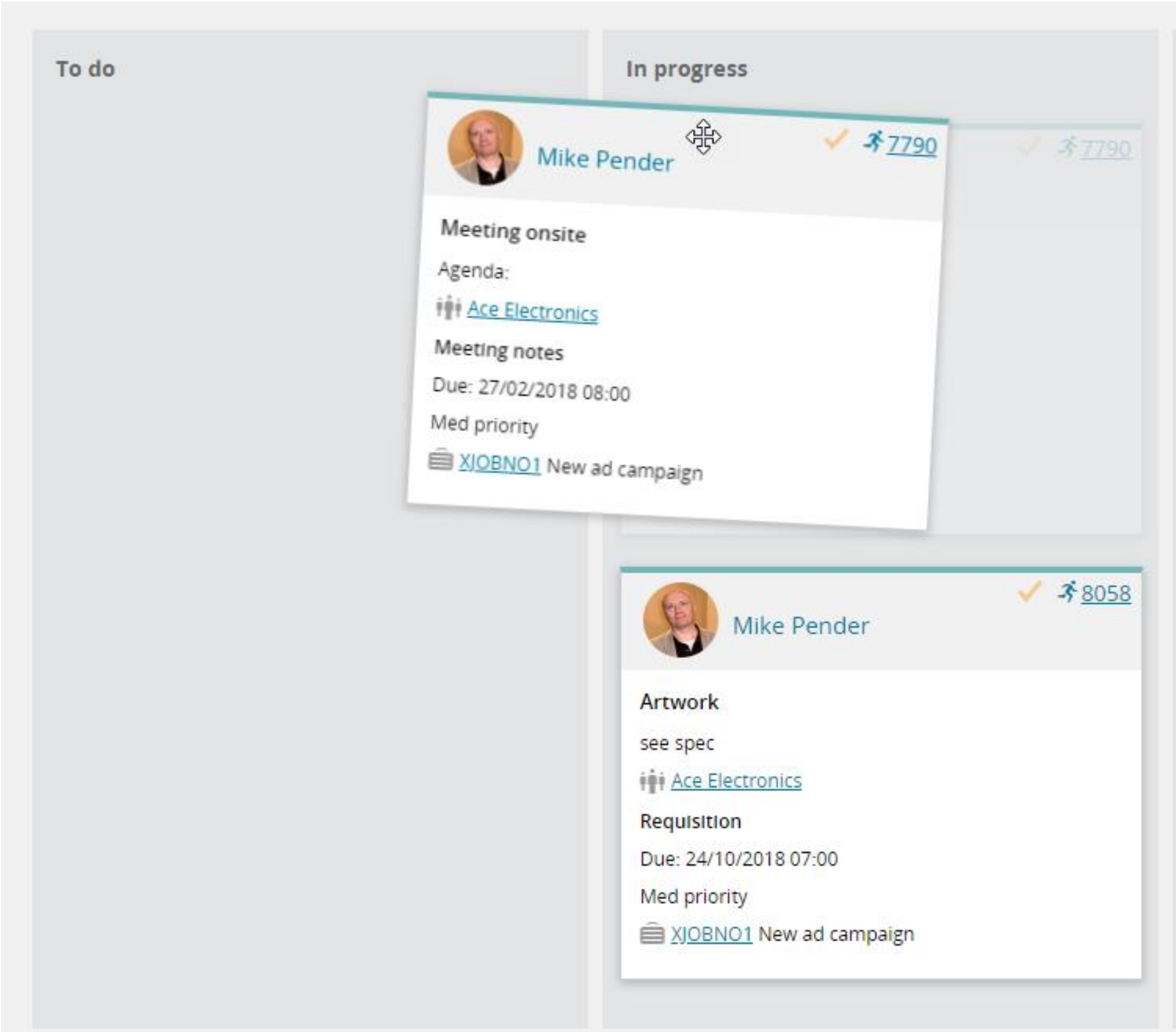
- Select a different board
  - You may have a selection of boards. Kanban boards are created in the File Maintenance section of Synergist.



- Drag a card from one column to another

Dragging a card from one Kanban column to another

The user can drag a Kanban card from one column to another. If a card is dropped into the 'Completed' column the associated activity is automatically set as completed. If the card is moved out of the completed column, it is re-opened.



The selected view

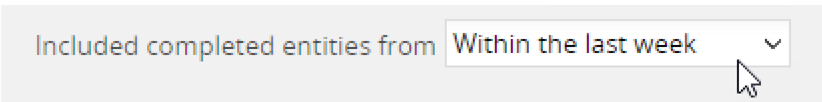
The view of activity records displayed in the Kanban board is the same as the selected view. However, when viewed in a Kanban board, the completed items displayed are controlled by an additional filter.

This is useful for two reasons:

1. You may only wish to see open activities – but you need to be able to drop them into the "Complete" column without them disappearing.

2. If you are looking at the Kanban from the main activity list and there are thousands of completed activities, you would need to filter these to a sensible number of completed items.

Option to select the scope of completed items that will display in the board

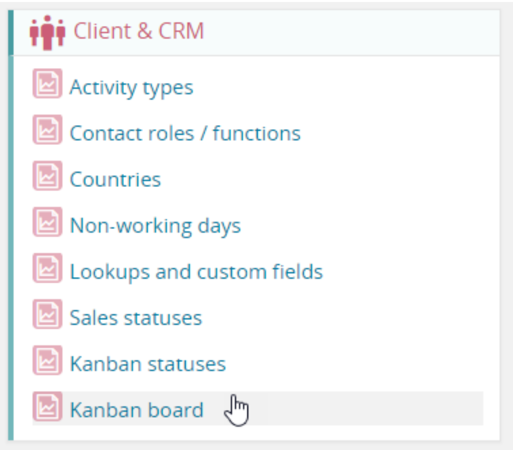


Creating a Kanban board

The system will come with one simple Kanban board provided. However, you can create as many boards as you need with as many statuses as required to describe your workflow processes.

In order to create Kanban boards you will need access to File Maintenance. Here you will see two new areas,

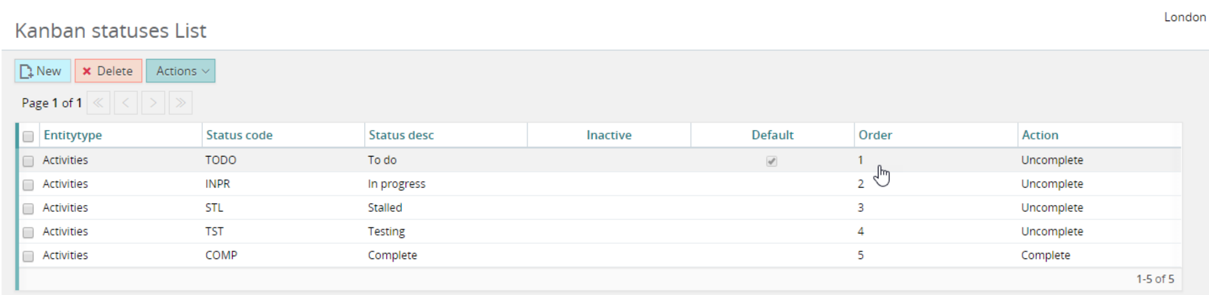
- Kanban statuses
- Kanban board



Kanban statuses

You should start by creating the number of statuses you require to describe your workflows.

By default you will have 'To do', 'In progress' and 'Completed'. However, you may wish to add some more statuses – as in this example.



Entitytype	Status code	Status desc	Inactive	Default	Order	Action
Activities	TODO	To do		✓	1	Uncomplete
Activities	INPR	In progress			2	Uncomplete
Activities	STL	Stalled			3	Uncomplete
Activities	TST	Testing			4	Uncomplete
Activities	COMP	Complete			5	Complete

1-5 of 5

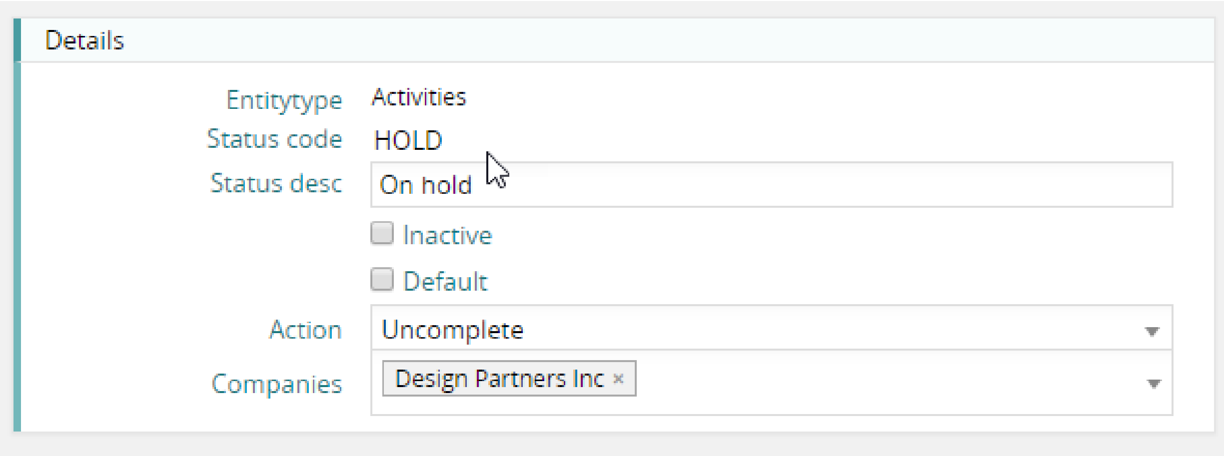
Note: All status codes are of type 'Activity'. Currently, Kanban boards are for activities only. However, in the future we may provide Kanban views for other areas of the product like jobs & phases.

Adding a new Kanban status

In this example, we are adding a new stage: 'On hold'.

Type into the form a meaningful code and a description. You also have to decide if moving an activity to this stage should complete the activity, or un-complete the activity.

You can also specify which companies will use this Kanban stage. Leave blank for all companies.

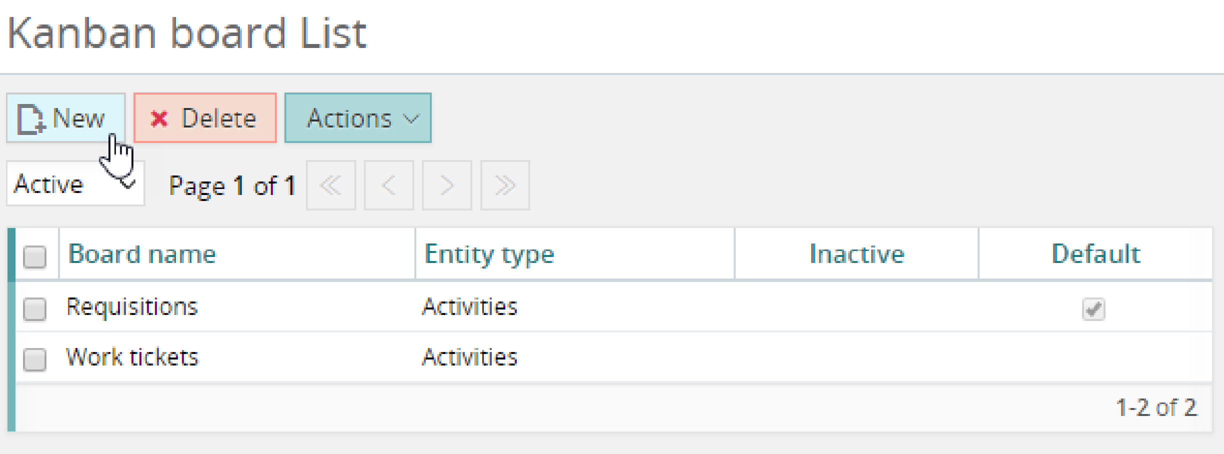


Note: There must be at least one stage set as 'action=Complete' and another 'action=Uncomplete'.

Adding a Kanban board

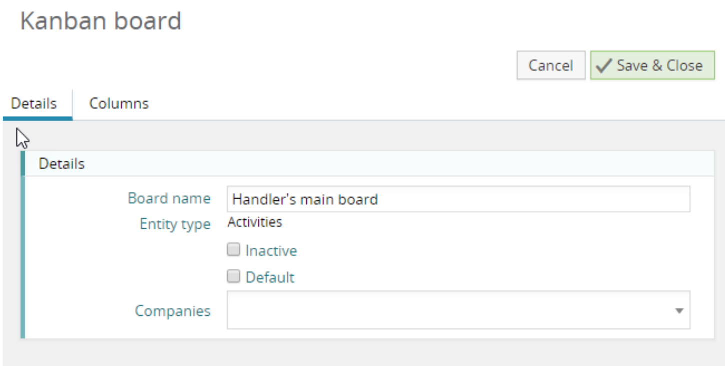
Select 'Kanban board' from the File Maintenance menu. From here, you can create and modify Kanban boards.

By default, you will have at least one Kanban board.



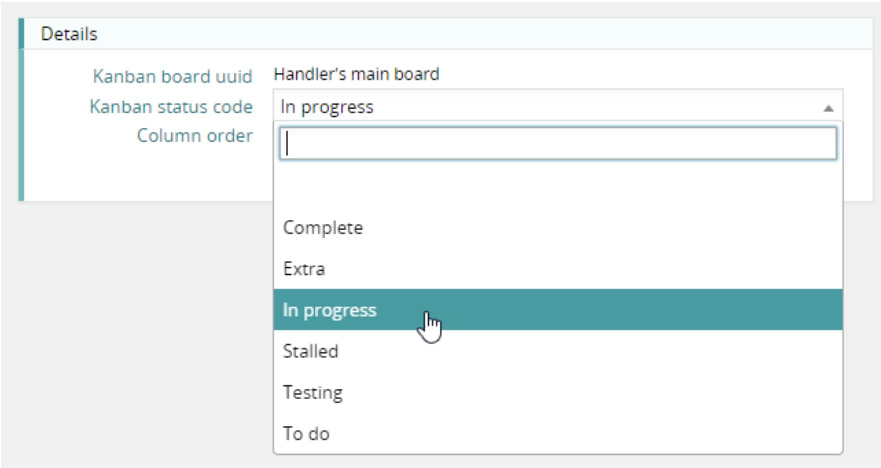
Adding a new board

Click the 'New' button, and give the board a name.



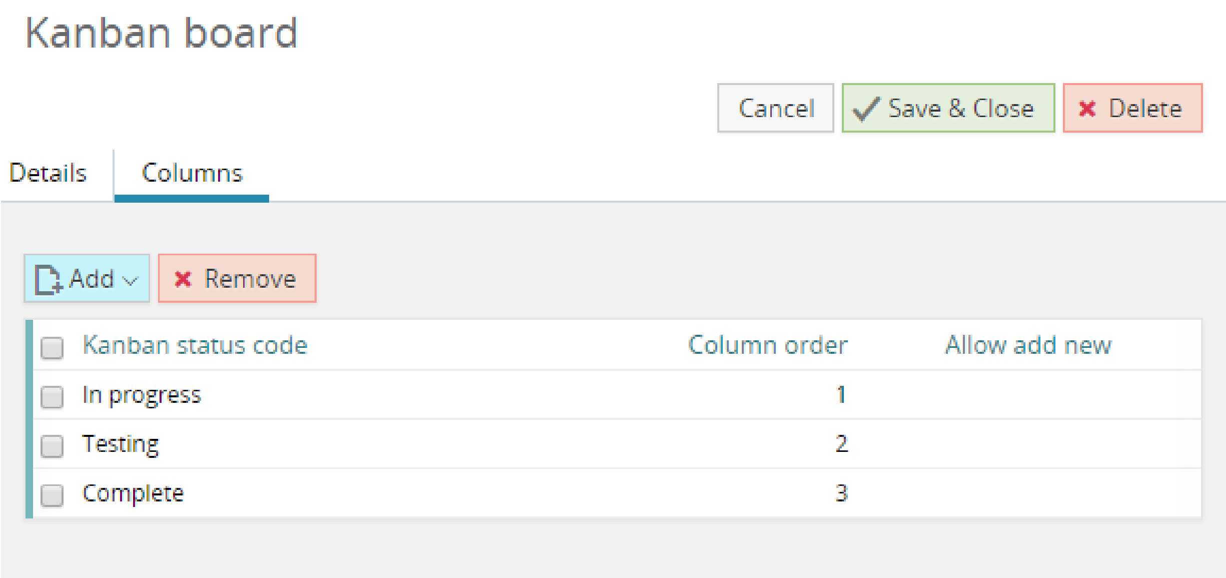
Adding columns to the board

Then select the 'columns' tab, and select a column you require for the board.



Continue adding columns until you have added all the stages you require for this board.

Note: you should enter a column order for each Kanban status to ensure the columns are in the order you require.



Note: You should be aware that only activities that are allocated to statuses present in the Kanban board will appear on the board.

MyTasks

MyTasks is a legacy feature.

Export

Simple MyTasks export feature has been added.

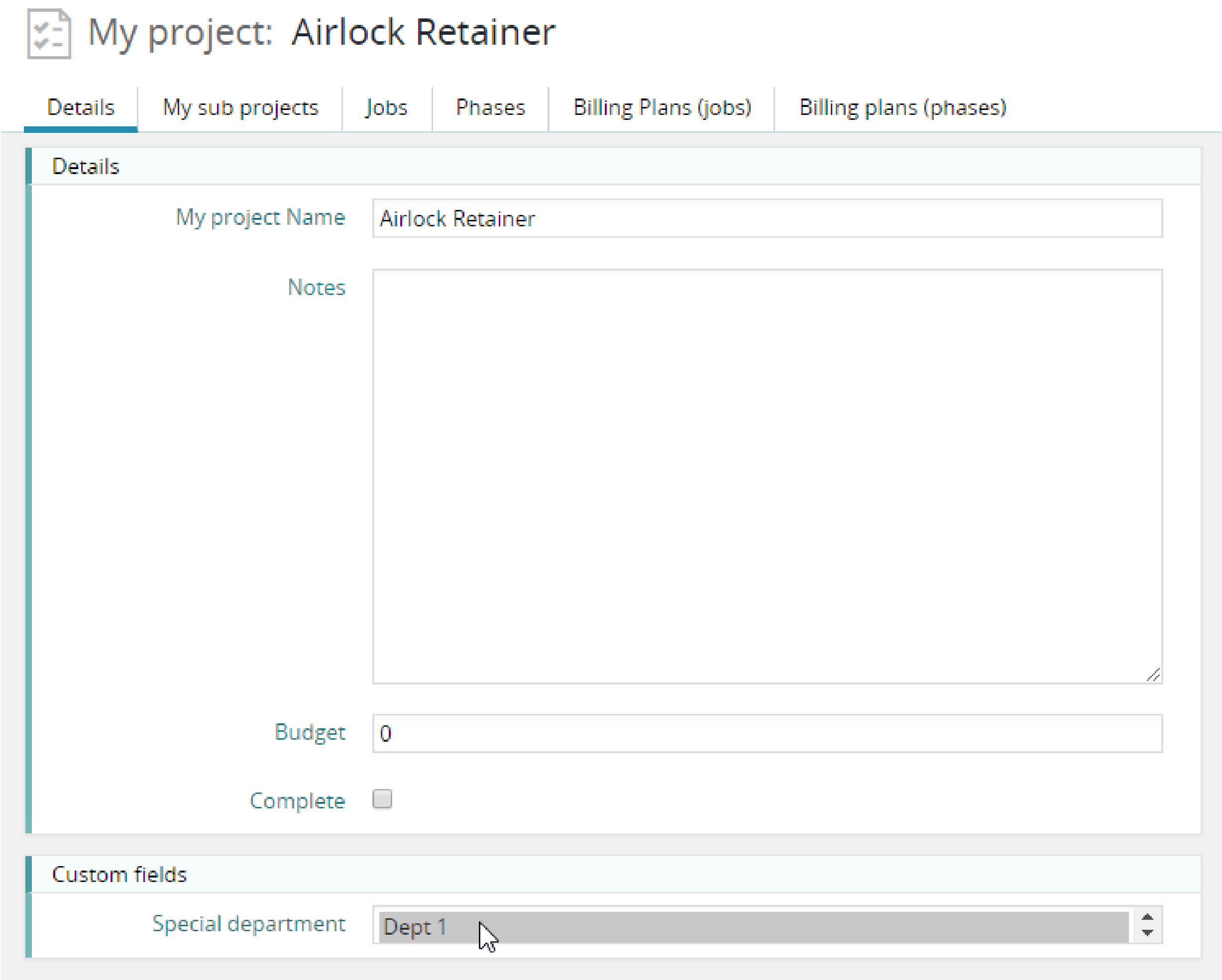
Projects & sub-projects (campaigns)

Job creation

During the initial creation of a job, it is now possible to create a new project or a sub project. This is particularly useful if project or sub project have been set up to be mandatory.

Custom fields

Custom fields are now supported for projects & sub-projects.

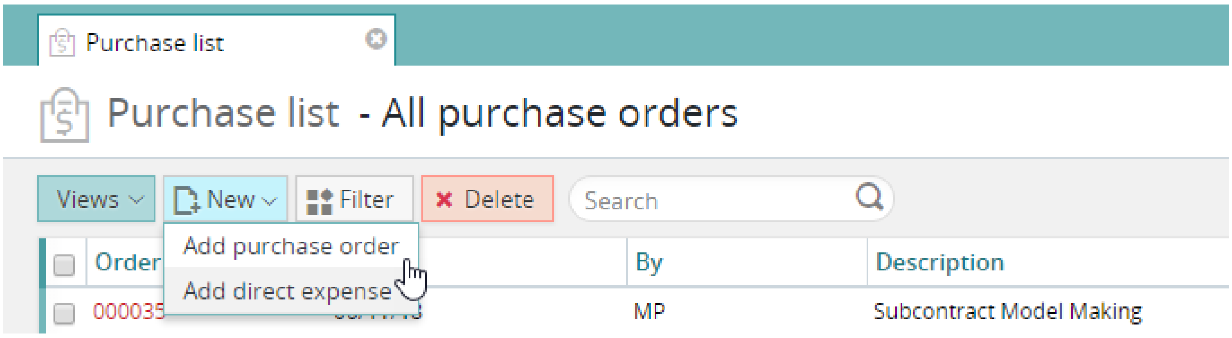


Purchasing

Create purchase from main list

It is now possible to create a purchase order from the 'Purchases' list.

After selecting the option, the user is prompted to select a job to raise the purchase against. The 'New purchase' form is then opened in a new tab.



Purchase "discount" feature

Synergist has always provided a feature for marking-up a purchase estimate/order. In this way, the recommended charge-out price associated with a purchase can be automatically calculated. The default percentage markup is determined by the "PO markup" on the client or supplier record.

This method works well in most situations. However, for business involved in selling advertising, it is common practice for Media outlets to offer a discount to agencies selling advertising on their behalf. In this situation, instead of marking-up the known cost of a purchase, it is normal practice to look at the selling price (the recommended charge) and discount this figure to obtain the cost of the advertising.

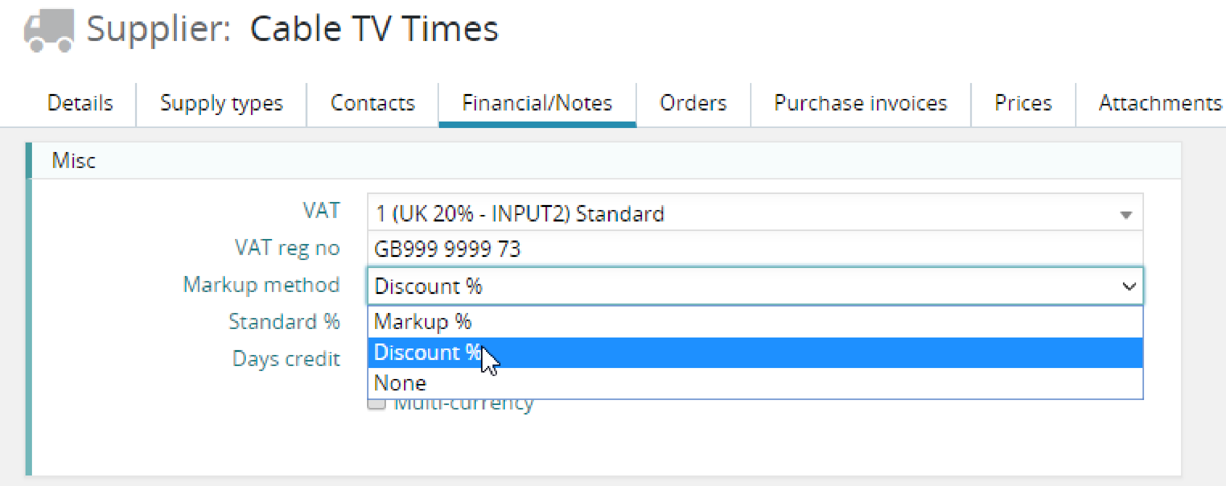
e.g.

Selling price for advertising	£100,000
Discount offered to agency	15%
Cost of the purchase order	£85,000

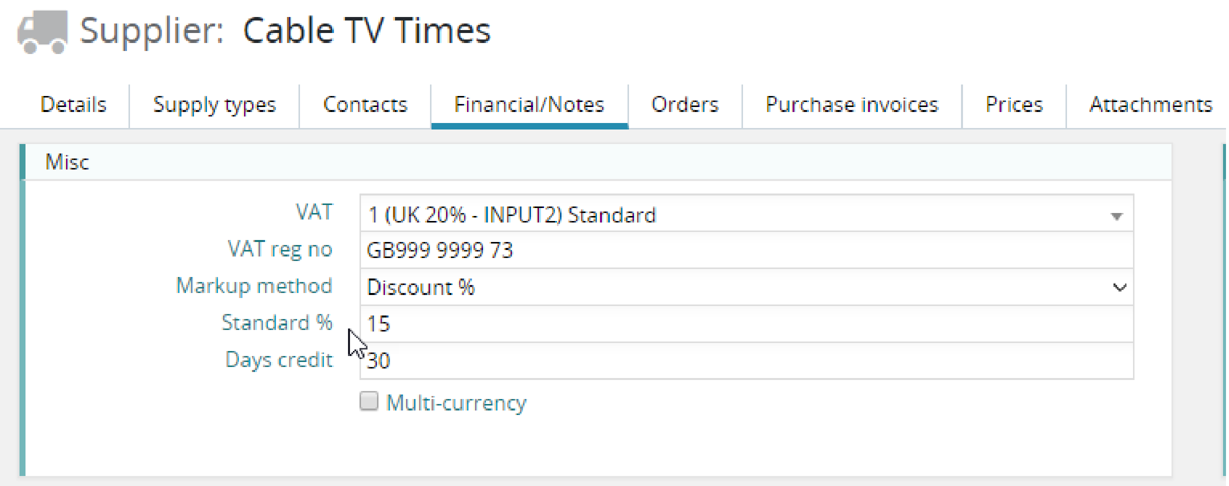
Synergist now supports this way of working.

Setting up a discount style 'Media' supplier

Create or open a supplier of advertising from the list of suppliers. On the 'Financial/Notes' tab change the 'Markup method' from 'Markup %' to 'Discount %.

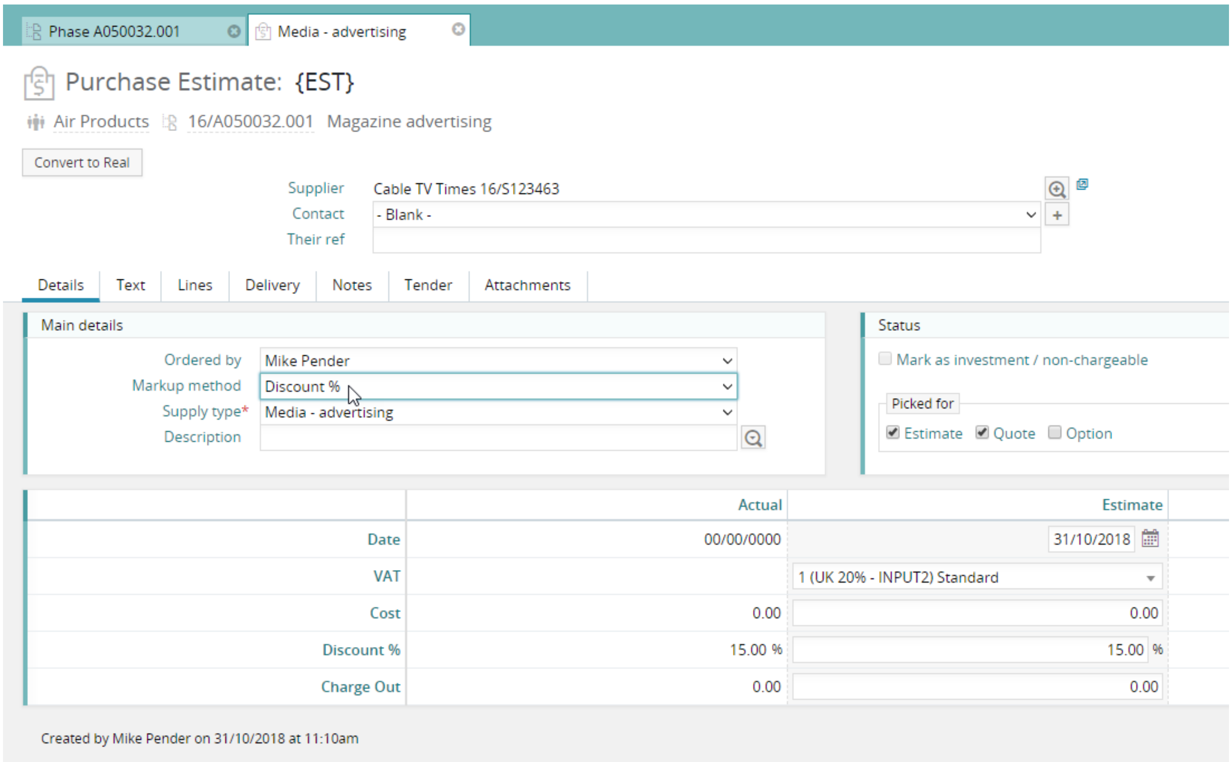


Then set the default percentage discount offered by this media supplier.



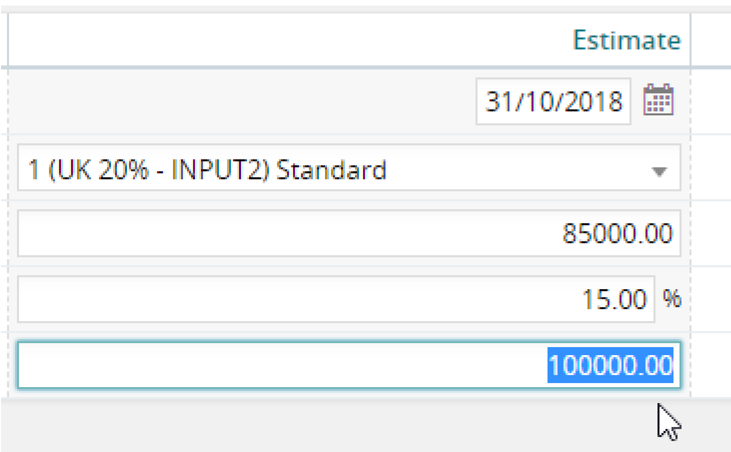
Creating a 'discount' style purchase estimate

Create a purchase estimate / order in the normal way. As part of this procedure, you will select a supplier. If the supplier you select is a media supplier, who is set to use 'Discount %', the purchase order will automatically be set to being a discount style purchase. However, you can change this by selecting a different 'Markup method'.



Entering the purchase order selling price (recommended charge out value)

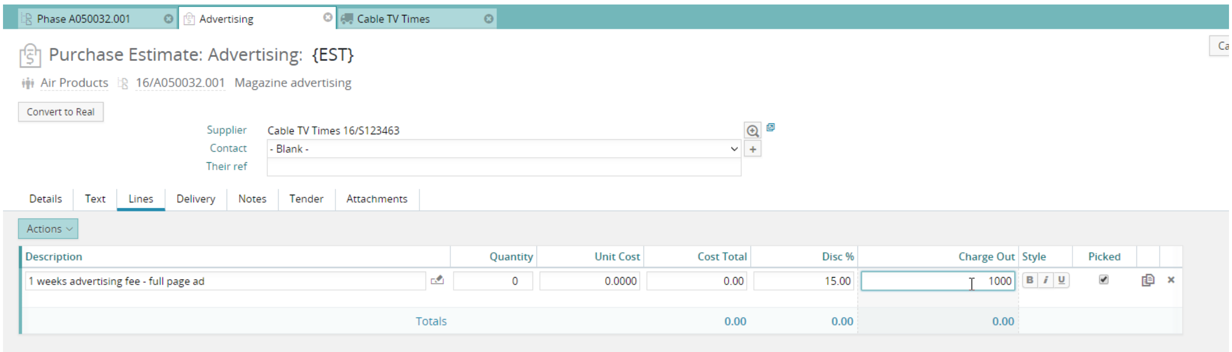
In this example, the selling price for this purchase is £100,000. Entering this value in the charge out box automatically calculates the cost to the agency – in this case £85,000.



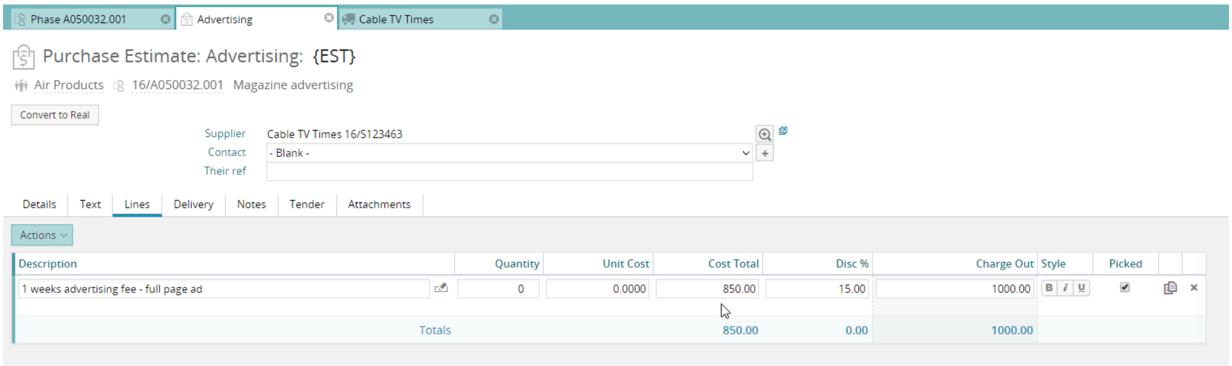
Using discount with purchase order lines

If you are using purchase order lines to create your purchase/estimate, the same principle applies.

The default discount is picked up from the supplier and appears under the disc % column. The user would then enter the amount the client is to be charged in the Charge Out column.



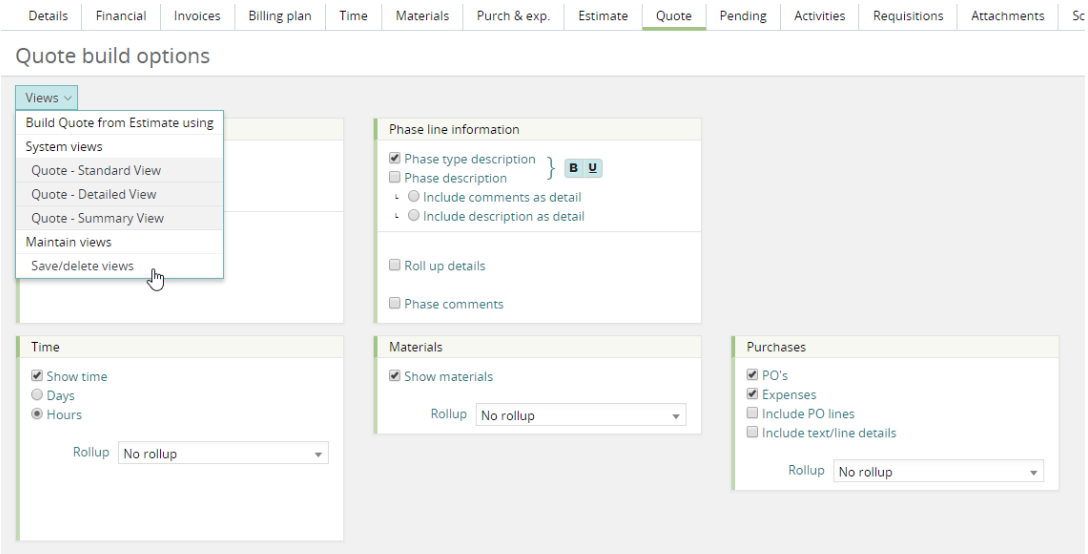
On tabbing out of the field, the system applies the discount to the line and updates the Cost Total.



Saving a view

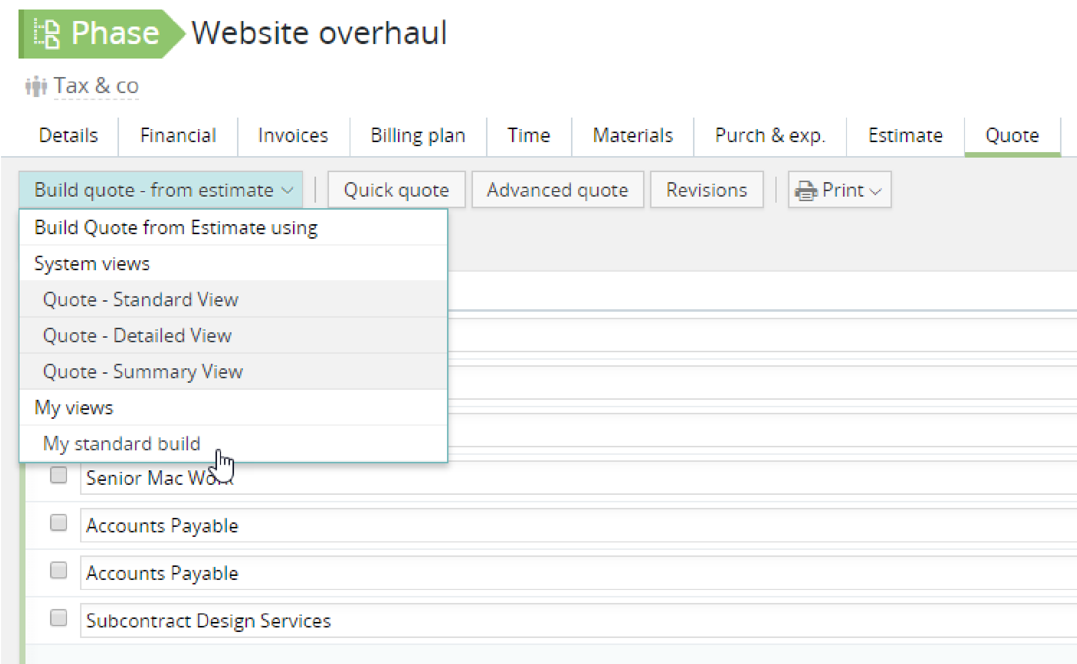
Quote 'build' views can be saved as views. Access this screen from the 'Advanced quote' button on the Quote tab of a job/phase.

The quote build options



Using the build

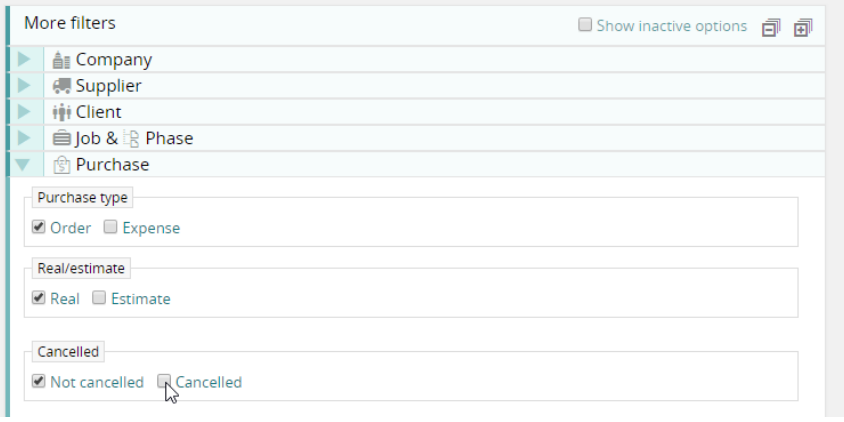
The new build can be set as the default build or selected from the views list when creating a quotation.



Reporting

Purchase orders report

Option to include/exclude cancelled purchase orders.



Purchase invoice awaited report

Improvements to the export: fields added

- Job description
- Phase description
- Project
- Sales invoice number

Client analysis report

Amendment value column renamed to "Variance".

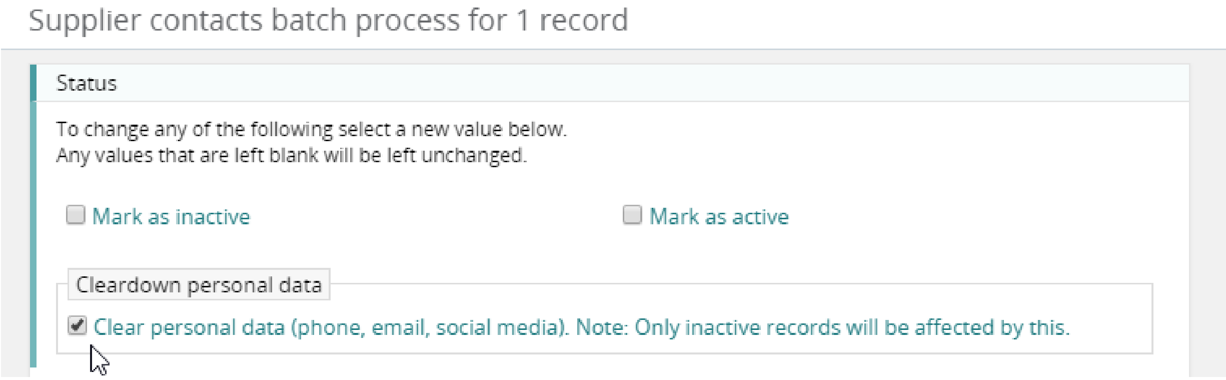
Staff utilization

Totals added.
Ability to sort by staff team.

Supplier contacts

GDPR clear down feature

Similar to the feature already available for client contacts. Ability to clear down personal data for supplier contacts using batch update.



Timesheets

Weekly timesheet auto save

When users enter time using the weekly timesheet feature, they should save the time they have entered prior to closing the browser. To ensure this procedure is followed the system will now automatically save any time entered into the weekly timesheet after 30 seconds.

Weekly timesheet – additional timesheet

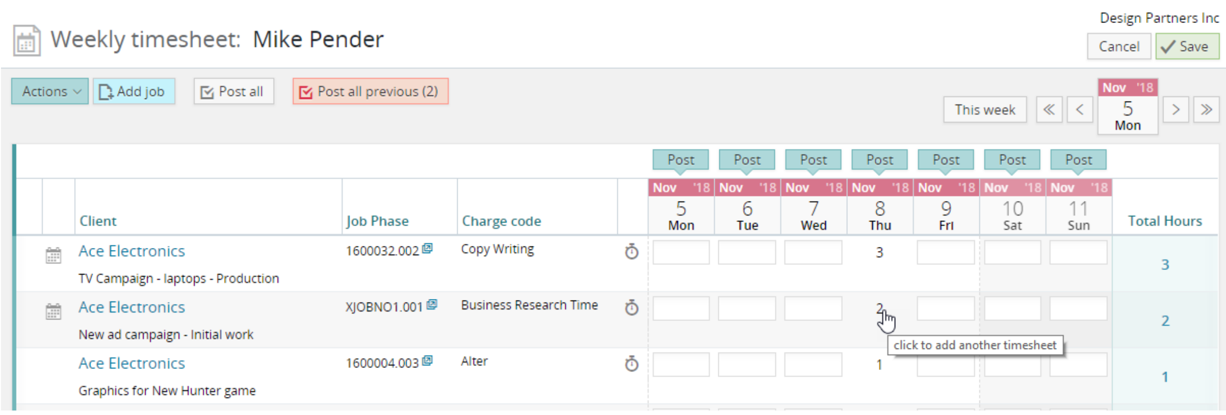
It is normal practice for users to submit/post the time accumulated on their weekly timesheet at the end of each day. Once this is posted, all the cells for the day are no longer enterable. This is because, in most situations, there is just a single timesheet associated with each cell. When the timesheet is posted, it can no longer be edited.

This is usually OK. However, what happens if a user does some work on a current job AFTER submitting/posting all the timesheets for the day? Previously, the only way to add an additional timesheet was to enter the Daily timesheet interface and create a timesheet there.

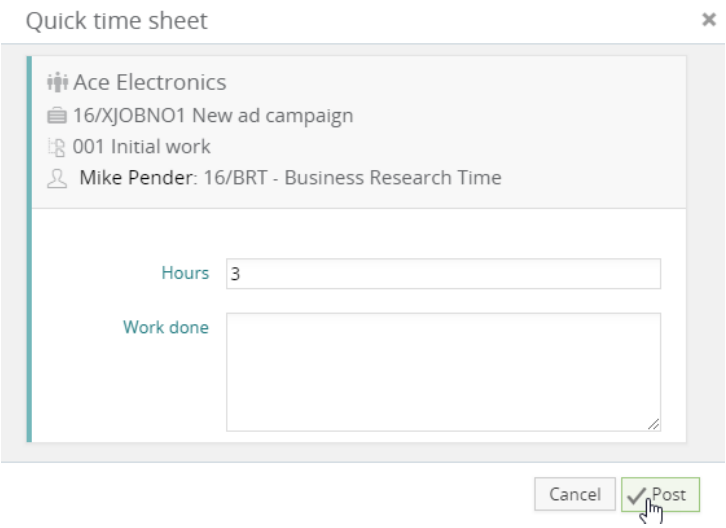
It is now possible to add an extra timesheet from within the Weekly timesheet interface.

Weekly timesheet

In this example, all the time sheets for Thursday are posted. However, if the user hovers over the time values the system displays 'Click to add another timesheet'.



Adding an additional timesheet



General Enhancements

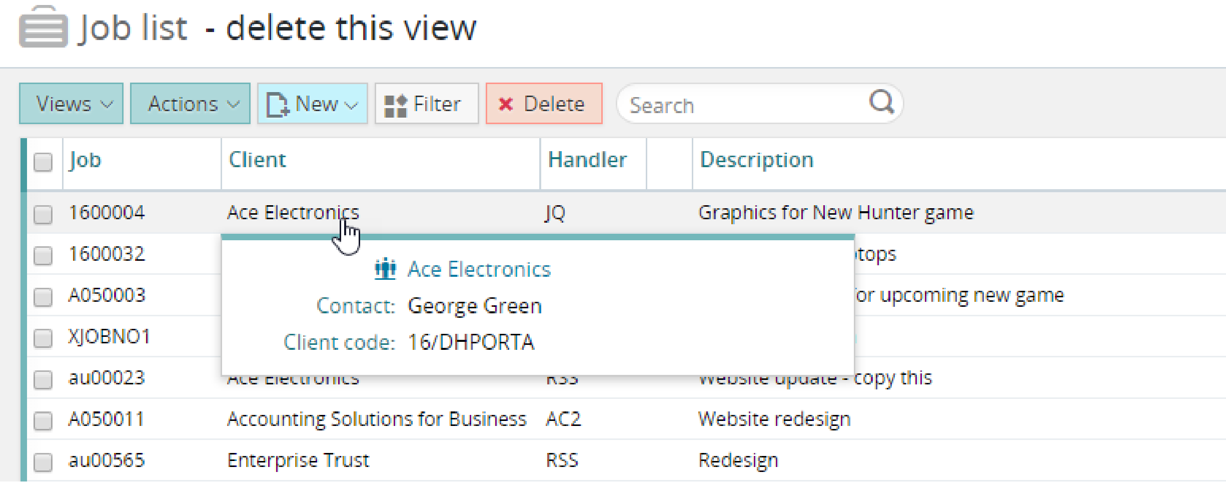
New hovers

The system now provides contextual hovers, to enable users to see key data in lists without opening records or drilling down.

Example from the job list

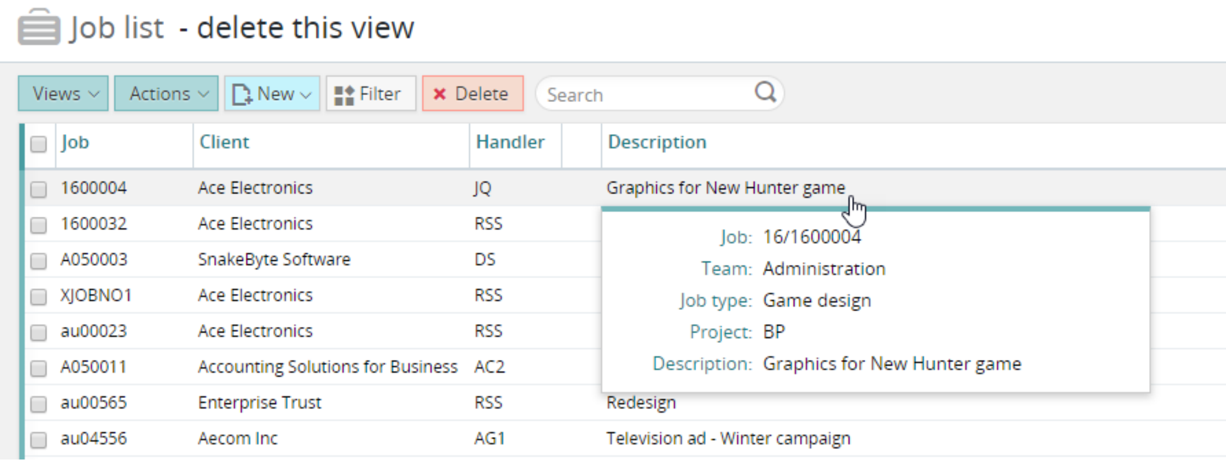
Client column

Hovering over the Client column – you see info about this client and a link to the client record.



Description column

Hovering over the Description column – you see job information.



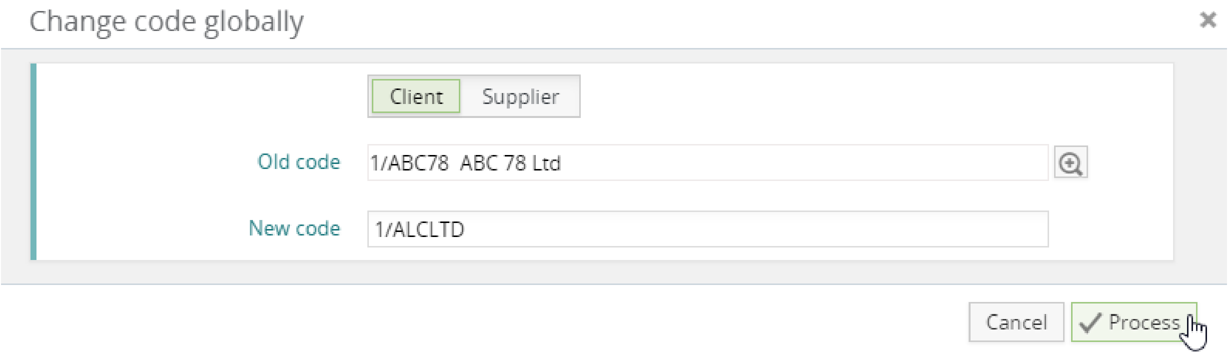
Advanced features

SQL database replication

New facility to specify which tables are included in the replication to an SQL database.

Utilities

Utility provided to change an existing Client or Supplier code.



Synergist API v3.3

The new v3.3 API adds new functionality to Synergist API. This includes full create/read/write access to Client and Client contact records.

See https://apidoc.synergist.co.uk